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ABSTRACT

Designed as an aid to professional advancement officers, this guide to planning and implementing special events consists of the following chapters: (1) "So You're Thinking of Holding a Special Event..." (the conceptual framework for planning, budgeting and implementation); (2) "Spreading the Word: Invitations and Publicity" (invitations, tickets, publicity and response); (3) "Find a Place, Get Comfortable" (how to choose and arrange the facility); (4) "Food for Thought: Eat, Drink and Be Merry" (menus, contracts and staffing); (5) "Welcome" (logistics for arriving guests); (6) "Raise the Curtain, Light the Lights" (audio and video considerations); (7) "The Follow-Up: It Isn't Over Till the Paperwork's Done" (activities for the month following the event); and (8) "Check and Double-Check" (checklists for each phase). Contains 8 references. (KM)

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Special Events: Planning for Success

April L. Harris

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Council for Advancement and Support of Education

Special Events: Planning for Success

April L. Harris

Council for Advancement and Support of Education

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In 1974, the American Alumni Council (founded in 1913) and the American College Public Relations Association (founded in 1917) merged to become the Council for Advancement and Support of Education (CASE).

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Preface

Special events are as germane to institutional advancement as alumni and pledge cards. Everyone needs well-planned special events, but few people are trained in planning them. It is all too common to find fund raisers, alumni staff, and public affairs personnel grudgingly planning special events while, at the same time, trying to keep on top of their "regular duties."

To me, this is a paradox, since good special-events planners need a set of rare and highly cultivated skills. The best planner has a solid background in public relations; the creativity of an artist; the organizational skills of a computer; the smooth persuasion of a fund raiser; an awareness of trends in etiquette, food, music, and decorating; the tact and sensitivity of a diplomat; nerves of steel; and the assertiveness of a rattlesnake. Alumni, development, and public affairs professionals hone their skills at myriad conferences and workshops—and with the help of many new publications each year—but rare is the conference or book wholly devoted to the special event.

Since most of us cannot afford the luxury of having a professional special-events planner on staff, I offer this book to smooth the way for those of you who find yourself thrust into the role of special-events planner. I hope it will help you determine how your special events fit into the public relations mix.

As with a special event, you can't do everything by yourself when you write a book. I want to thank Victoria Hill Welling for volunteering her expertise in helping me prepare this manuscript. It contains notes from my travails in the world of special events. I truly enjoy special events, and I hope this book will help you enjoy them too.

April L. Harris
Houston, Texas
October 1988

Foreword

Everybody loves a good party, and often that's what a special event is. Special events are fun. They build goodwill, engender eye catching news coverage, bring new friends to your campus, entertain potential contributors and reward those who already gave (and will, we hope, give again). Undoubtedly special events are one of advancement's best tools; they enable the institution to "put its best foot forward" in ways that count.

Communications research shows that the fastest way to change a person's attitude is through personal contact. When you bring your friends and supporters—or those you would like to be friends and supporters—to your campus, you show them a picture that is, indeed, worth more than a thousand of the most eloquent words you could put together. At this important point in the history of American education when we must establish and maintain channels of communication with our public, special events can bring people to our institutions in settings and situations that will help them begin to understand us. Special events enable us to mix and mingle with those whose support we need; special events enable us not only to tell our story in effective ways but also to show it.

As April Harris says:

> Special events provide the opportunity to deliver your message personally to your constituents by showcasing your institution in interesting, time-effective, creative ways. Special events can help you educate, make a point, build friendships, enable your constituents to feel like "insiders," and foster a sense of community.

But in order to accomplish these aims, special events must be part of overall institutional planning. "Do not create your special events in isolation," Harris cautions, "but weave them into your total advancement program." Each special event should play a role in reaching your institution's advancement goals.

Harris takes us through the steps to a successful special event, from making sure your invitation gets read to paying the bills when the party's over. She reviews the questions you must answer—the "who, what, when, where, how, and why" of your special event. Her concluding chapter, "Check and Double-check," helps you remember the many details that will make your event special.

After 13 years in institutional advancement, Harris has experienced many of the things that can go wrong at a special event and has lived to tell the tale. Benefit from her wisdom and experience as you enjoy this unpredictable and demanding—but exhilarating—aspect of institutional advancement.

Gary H. Quehl
President, CASE
October 1988

Introduction

On a gray March morning, I sat next to our vice president for university relations awaiting his presentation to a select committee of 25 members of our university community. The committee had been formed to plan and implement the university's 75th anniversary observance—a year-long celebration that was to be the backdrop for a major fund-raising campaign.

The vice president's charge to the committee members stressed the importance of their role in shaping the celebration. They would determine a theme that would best serve our cause; they would set the tone of the celebration, give it momentum, and lend it credibility. My job would be to help coordinate the committee's suggestions and help transform its dreams into reality.

As the vice president spoke, I thought to myself that special events were the aspect of my job I most enjoyed. Special events provided the opportunity to escape from day-to-day routine, to let the creativity flow, to implement those public relations tools reserved only for the most important situations. In short, special events gave me a chance to stretch and grow as an advancement professional.

A mere 24 hours later, however, I had a different point of view. I had arrived with the same vice president at our grand ballroom just an hour before a breakfast for 125 of the university's most important donors was to begin. When I had checked the room the night before, the tables were set and everything was ready. But when we unlocked the door, we beheld an entirely different scene: The room was completely empty!

There was no time to speculate as to why, despite our careful instructions, the night crew had torn down our banquet set-up. At that point, my colleague and I knew that it was up to us. Moving on quick jolts of adrenaline, we scrambled to pull things together.

As our guests assembled in the hallway, I raced through the kitchen in search of food service personnel. The vice president dragged tables from their dusty storage place, and another coworker recruited students from the downstairs cafeteria to reset the tables. Dirty and sweaty, we plastered smiles on our faces and opened the doors just 15 minutes later than the announced starting time.

Our guests never knew what had transpired, but I remember thinking that day that special events were, in fact, the worst part of my job! They can be so unpredictable, so unreliable, so many things can go wrong....

Chapter 1

So You're Thinking of Holding a Special Event...

What are special events? Special events are those occasions to which an institution invites outsiders—whether they are alumni, business leaders, parents, donor prospects, potential students, or even members from one department visiting another—for a closer, more personalized look at the facilities, faculty, staff, students, and policies of an institution than is generally afforded on a daily basis.

Special events can include annual events such as homecoming, commencement, convocations, retirement recognitions, or parents' day. They can be unique, one-time events, like the dedication of a new facility, the celebration of an anniversary, or the inauguration of a president, or they can be events planned specifically for a certain audience, such as donor recognitions, legislative relations days, or academic symposia.

Special events can also take place away from your campus. These might include conferences and workshops, planning retreats, alumni meetings in faraway cities, alumni days at places like a major-league ball game, an amusement park, aboard a river paddlewheeler, or at an off-campus restaurant or hotel.

Sometimes, major special events have many small events tucked under the umbrella of a large theme. On a convocation day, sub-events might include a hospitality reception for the press, a breakfast for visiting dignitaries, a morning program, special displays and tours, a luncheon, a post-convocation reception in a tent for special guests, and a private dinner with the president that evening for a few select individuals.

Whether an event is massive in scope and available to the general public, like a concert, or private, such as dinner for five key alumni at the president's home, special events put an institution on display. They offer the opportunity for people to look at and, indeed, to scrutinize the institution and its programs. Powerful communicators, they send messages that make a far more lasting impression than the most expensive brochure or the slickest alumni magazine money can buy.

Because special events are such powerful communications tools, be sure to use them wisely: Never lose sight of the long-range goals of your advancement program. Do not create your special events in isolation but weave them into your total advancement program so that all activities complement each other.

Each event must be consistent with the spirit and tone of your advancement program and the institutional image you want to communicate to your friends. The most brilliantly designed

and executed special event will be counterproductive if its message is confusing or inconsistent with your institution's other activities. Plan and implement your special events so that they will add to and not detract from the central themes of your institution.

Special events are akin to inviting guests to your home for dinner. In the same way a dinner guest can gather information about your financial status, eating and drinking habits, reading preferences, and approaches to child rearing, guests at special events can draw conclusions about your institution. Special events reveal more in a few hours' time about institutional priorities, politics, financial condition, management style, and needs than a year's worth of press releases or magazine articles.

Because their impact is so forceful, because they cover the spectrum from routine to stupendous, and because they are planned and managed by everyone from admissions officers to university relations personnel, to volunteers and committees, it is important to understand the role of special events in the institution's overall advancement plan and realize what special events can and cannot accomplish.

A well-planned special event begins with that old journalistic formula, "who, what, when, where, how, why" (and as a professor of mine added, "so what?"). Successful events are rooted in thoughtful, sometimes frustrating, planning.

You may be tempted to build a grand event full of razzle-dazzle and hoopla, but if it is not solidly anchored in mission-accomplishing strategy, your efforts—and money—will be wasted. The 1984 *Best CASE Book*, which describes 155 award-winning ideas in CASE's Recognition Program, says:

> The four winners in the Special Events category were exceptional entries. Most entries, however, lacked defined objectives that were achieved and documented with results. Several had a lot of sizzle but little substance. Others were interesting ideas, often with VIPs and celebrities involved, but lacked any relation to the mission of the university. (Charles M. Helmken and others, *Best CASE Book* (Washington, DC: Council for Advancement and Support of Education, 1984))

Alas, this is the problem with many special events sponsored by organizations ranging from alumni associations to charities.

There is one valid reason to sponsor a special event: It supports and enhances institutional goals and mission, contributing to the accomplishment of objectives in academics, alumni relations, student recruitment, or image building. Random events held for the sake of a one-day success or as a diversion from daily routine can send mixed messages to your audiences and sap resources that could be used more effectively in a well-planned public relations program.

Therefore, before agreeing to plan and hold a special event, ask yourself these questions. Does the event:

- support the institution's mission;
- help achieve specific goals;
- showcase resources unique to your institution;
- help friend raise or fund raise;
- build goodwill;
- consistently comply with the institutional image; and
- match available resources?

If the answer to any of these questions is "no," send the idea to the scrap heap and review the conditions that gave rise to it. Ask yourself: Why do we think we need a special event? What do we hope to accomplish? Is a special event the most effective tool to fill the need?

Special events ideas that pass the test can yield powerful minutes of undivided attention

from your target audiences. A potent "show and tell," special events provide the opportunity to deliver your message personally to your constituents by showcasing your institution in interesting, time-effective, creative ways.

Special events can help you educate, make a point, build friendships, enable your constituents to feel like "insiders," and foster a sense of community. Last but not least, special events are enjoyable, pleasant means of social interaction.

There are several things special events cannot accomplish no matter how well planned they might be. Special events cannot erase years of neglect; they cannot instantly turn the tide of an institution's image, or act as a Band-Aid to cover up bad policies or poor leadership.

Instead, like a holiday, special events serve to bring resources, people, and messages together to accomplish specific objectives. With proper research, planning, communication, and implementation, special events can be some of the most effective, creative, and enjoyable components of a comprehensive institutional advancement plan.

Planning makes it work

Planning is the most crucial, most time-consuming aspect of successful special events. This chapter focuses on planning at the conceptual level—how the event will fit into and contribute to your total institutional advancement efforts. The balance of this book explores planning at the concrete level—the mass of painstaking details that are necessary to produce a successful special event.

Special events should be developed in the context of your institution's annual public relations plan and in relation to long-range institutional advancement goals. Positioning special events in a "master plan" helps avoid duplication of effort and wasted money. It prevents you from bombarding the same target audience with too many messages and too many invitations. Good planning may help you piggyback on other communications efforts for more meaningful impact. Master planning also helps ensure that events are consistent with institutional goals in public relations, image building, and marketing.

Let's say that one of your most prominent alumni is the head of a national scientific research organization. He recently has been the focus of media attention and has offered to speak at your campus at no cost to your institution. The construction of the new chemistry building on campus is nearing completion and the ribbon-cutting will take place sometime this year. By timing the alumnus's visit to coincide with the ribbon-cutting, you can draw more attention to his talk, guarantee a better crowd, and add a bit of sparkle to what could otherwise be a routine dedication ceremony.

Sound easy? It's not. Perhaps the chemistry department has already selected a speaker. Perhaps the planners of the ribbon-cutting will resent your office "butting in" on their event. Perhaps the alumnus is not held in high regard by the chemistry faculty. Perhaps he doesn't want to be the focus of more publicity.

The point is, never assume anything. An idea that looks great at first blush may not appear so when viewed in relation to the big picture. Only through one-on-one discussion with other campus event planners can you make sense of the big picture and put together a special events calendar that will pack a wallop and return the greatest public relations payoff to your school, college, or university.

Guided in the long term by the institutional mission and in the short term by institutional goals and objectives, the central public relations office should serve as a clearinghouse for

all special events. That is, any time you are considering sponsoring an event designed to attract outside attention, from the media, alumni, or the general public, the chief PR officer of your institution should be consulted *before* ideas become plans.

From a purely textbook point of view, all special events should be managed from the central public relations office. In reality, many institutions are too large and most PR offices are too sparsely staffed to take on such a task. Nevertheless, the chief public relations officer should have final approval on all special events that are planned, and he or she should be consulted on the scheduling of each one.

Do it by campus committee

While the chief public relations officer should have the final say, you can also coordinate special events by assembling a committee of people on campus who might be planning special events during the coming year. The committee considers the list of proposed events, weeds out the marginal ones, and schedules the remaining events to avoid duplication, build impact, and maximize your investment of time and money.

The committee's initial planning meeting should be very general. The chief PR officer can provide an overview of priorities and goals for the coming year. He or she should sketch the framework of major projects, such as a fund drive, awards, and a building dedication, within which the committee can plan the year's events.

This is the time to talk about the programs, people, and projects that need to be highlighted. It is the time to confirm the dates for major functions such as commencements, concerts, parents' day, and sports events. It is also an opportunity to gather information that can avert event-planning disasters—such as scheduling a large event at the student union during the time its parking lot will be closed for resurfacing, or holding the alumni awards banquet during the most important football game of the season.

Your master plan

Armed with a sense of the big picture for the coming year, you can then develop your own office-wide special events master plan. Work your plans around the events already in place. This may mean avoiding a date, dovetailing into a date, or just being aware of other activities and how they could affect availability of space, services, and media coverage as well as your targeted participants.

Refer to the written goals and objectives for your office. What do you want to accomplish? What are the timetables and deadlines?

A good tool to use for this planning exercise is a wall calendar that displays the entire year. Block in the events already scheduled—homecoming, commencements, board meetings, and breaks. Study the calendar. Are several events crowded into a few consecutive weeks? Are they intended for the same audience? Will major events already on the calendar prevent you from having access to a facility or service you need?

Referring to your goals and objectives, make a list of *what* needs to be accomplished; leave the *how* until later in your planning process. For example, if you are a member of the development staff, your "what" list might include twice-a-year contact with emeriti faculty, major donor recognition, an announcement for the wrap-up of a successful fund drive, contact with

parents of scholarship students, and recognition of volunteers who have helped fund raise throughout the year.

In the public affairs office, your "what" list might contain items such as introducing the president to community business leaders and area media, making key legislators more aware of funding needs, recognizing student leaders, and planning the annual convocation.

Now, match goals and objectives with key dates whenever possible, and, considering your "what needs to be accomplished" list, look for logical tie-ins for your target audiences. For example, you know that the School of Music will sponsor a concert series beginning in February. The afternoon preceding the first concert may be the perfect time to invite select donor prospects to a dinner and present plans to enhance the concert hall.

Pencil in dates that seem attractive. Consider the availability of staff and facilities, especially on weekends that are already busy. Will there be enough time to prepare facilities, or are events stacked back-to-back so that one delay means disaster for all that follow? Will your staff be spread too thin to handle the work effectively? Are so many events planned that caterers and service personnel will be in short supply?

Think about the people you want to involve. Will they have just been to campus for another event? For example, if you plan a recent-graduate reunion within a few weeks of homecoming, alumni will probably choose one event or the other but not both. By moving your recent-graduate reunion to a spring weekend, you stand a better chance of having solid attendance at both functions. Or you could package the two events on the same weekend, thereby increasing the incentive for alumni to attend.

Next, get specific. You've analyzed the big picture; you've zeroed in on probable dates. What should you plan? Think about each project's significance as part of your total master plan and how it will fulfill the specific goals you've decided upon. At this point, you should decide whether or not to use a committee to develop plans and how much leeway such a committee would have.

Principles to live by

Follow a few basic principles when you are deciding on the theme or type of event your institution will sponsor.

Consider the target audiences. Are they young, old, students, professionals? Are they alumni or parents who are familiar with your campus or are they people who have never been on campus before? Are they affluent or on a shoestring budget? Are they members of a constituency that will have several opportunities to participate in events on your campus during the year or are they a group for which this special event may be the only firsthand exposure for several years?

Be certain the event is consistent with your institution's image and principles. For example, if alcoholic beverages are not permitted on campus, don't try to skirt the rule in an attempt to incorporate them into an event. Don't merely work within your limitations, but use them to make a positive statement about your support of your institution's rules and principles.

Recently, a national health organization specializing in educating the public about good nutrition and the prevention of heart disease, sponsored a star-studded fund-raising gala. The dinner guests were served a high-fat, high-cholesterol meal of foods that the organization advises people to avoid.

Why did the organization's planners choose such a menu? Because they were afraid paying guests would not feel they had received their money's worth if a low-fat, low-cholesterol

dinner was served. What an educational public relations opportunity they missed! The planners should have worked *with* the situation instead of *against* it, to wow their guests with a menu featuring the healthier foods that the organization advocates. They could have designed a menu card that compared the nutritional value of each item to that of standard banquet fare. They could have created a model—and delicious—meal that would encourage their guests to make healthful choices in daily life.

Use events to highlight features unique to your institution. Or, at the very least, focus on attractions that are not readily available elsewhere in your community. Draw attention to the programs, people, and facilities that set your institution apart. You will increase attendance at your event and make a long-lasting impression on the people you invite.

Be prepared to say no

From time to time, ideas will surface that are not in sync with your master plan, that are inconsistent with your institution's image, or that would use up most—or all—of your budget. Unfortunately, these are often the ideas that really catch on and inspire their originators to dig in and begin working.

Whether you are responsible for institutional relations as a whole or just for the events of a particular department, if the idea is not consistent with the special-events master plan, it is your obligation to speak up and quash it. Do this in a constructive way, armed with an alternative as well as a well-thought-out explanation of your master plan.

Financing: How to pay for special events

By their very nature, special events fall outside of the traditional budgeting process. Events can appear suddenly, as an answer to a particular problem or as a way to take advantage of an unexpected opportunity. They can grow from modest to grand, seemingly overnight. The number and types of special events vary from year to year. One manager may be more resourceful than another in securing donations to underwrite special events. The projected cost of an event may fluctuate with several different factors, from the size of the audience to the weather. Ticket sales may fall far short of projections or you may discover that the decorating committee has overshot its budget by 50 percent. Budgeting for special events is therefore frequently a process of calculated, educated guesses.

Some special-events planners have an annual budget allocation that includes seed money to invest in events that aim to be self-supporting or to underwrite part of the cost of certain events. They are the fortunate ones.

Build a budget based on research

You should be able to build a budget proposal based on your master planning exercises. To do this, estimate the costs of each event, including:

- facilities;
- equipment;
- security;
- entertainment;

- decorations;
- invitations and program printing;
- postage;
- food;
- extra help;
- speakers' fees;
- travel expenses; and
- liquor or wine.

Don't just pull numbers out of the air. Call local vendors to get estimates for each item or service. Shop around; you may find that some vendors can do certain things cheaper than their competitors.

Depending on the budget process at your institution, you may be able to acquire funding from several sources. Additional outside funding may be available from your alumni association or university foundation. Some universities, such as those receiving government money, cannot legally cover the costs of some types of special events, particularly if alcoholic beverages are served. Check with your institution's financial officer for any restrictions that may apply.

In fact, it's important to learn to work with your financial officer beforehand, so that you know the restrictions and procedures under which you must operate, as well as the accounting and reporting procedures you must use to process your expenditures.

Corporate sponsors

One way to underwrite the cost of a special event is to secure corporate sponsorship.

A word of caution: Never set out to secure corporate or foundation sponsorship of a special event without clearance from and coordination with your development office. This office may have a proposal in the works or pending before the potential sponsor. You don't want to endanger a larger, more important gift to your institution by not doing your homework. At the same time, you don't want other proposals coming in later and competing with yours.

The development office can also save you from going down blind alleys, offer approaches to your potential sponsor that are based on experience in dealing with the organization, and possibly suggest alternative sources of support that you had not considered.

Corporate funding can underwrite some or all of the expenses of an event. That gives you the option of opening the event to the public free of charge, reducing ticket costs, or increasing your "profits" from ticket sales.

Sponsorship can also take the form of gifts of goods and services. Again, work with your development office to avoid stepping on toes and to identify alumni and local business people who may be able to contribute goods and services that will help defray expenses. One midwestern university receives a donation of meat from an alumnus in the meat-packing business. The meat is served at recognition banquets to help reduce food costs. The alumnus receives recognition and his company receives advertising and a tax break.

However, *don't* promise deductions and recognition until you've checked with your development office. Not all gifts qualify for a tax deduction. Some institutions give donor recognition for these gifts, others do not. Finally, if you are dealing with athletic special events, be certain any gifts you receive comply with governing rules of the NCAA and any athletic conferences or leagues to which your institution belongs.

Be sure to give your sponsors full recognition in *all* printed matter concerning the event.

That means on invitations, advertising, press releases, and, of course, at the event itself. An excellent guide for working with sponsors is *Letitia Baldrige's Complete Guide to Executive Manners*, which includes a chapter on corporate relations for nonprofit organizations (see listing in Bibliography).

Capitalizing on student talent

Sometimes we overlook one of our most obvious and valuable resources: our students. Students in your school of music or theater can provide quality entertainment at little or no cost. One of our most successful dinners for our alumni association board was planned, prepared, and served by students in the university's catering and restaurant management program. The board was so impressed that it voted the restaurant management program an annual scholarship appropriation.

By using students, you reduce overhead, give the students experience performing in a "real world" setting, and enjoy the public relations advantage of showcasing the institution's number one product.

Planning committees: How to use them

Like it or not, the best events are those that are planned by committee. A well-managed committee provides the creativity of several people with varying points of view and differing ideas.

A good committee should include people who are active, involved, and well-informed about your institution and objectives. It should include representatives of each of the groups you are trying to reach. For example, a homecoming committee should include alumni, members of each reunion class, students, faculty, and representatives of groups that will play a significant role in the success of the day such as the marching band, the football team, the catering service, campus security, and other organizations.

Well-chosen committee members can open doors for you. Enlist the participation of financial and social leaders, key business people, influential citizens, and prominent alumni. But don't select someone only for name or position. If an individual cannot make a specific contribution to the committee's mission, don't invite that person to serve. There may be an appropriate role on another project. You owe it to yourself, to the other committee members, and to your event to assemble the most active, creative, productive committee possible. By the same token, don't ask busy people to serve on a committee if you have no real intention of using their advice, talents, or time.

Working and honorary committees

There is a considerable difference between working committees and honorary committees. Members of a working committee are expected to do just that—pitch in, roll up their sleeves, and get the job done. Typically, members of this type of committee have similar professional and social status, although the chair may be a prominent alumnus, professional, or business leader.

Honorary committees, although they may hold meetings, do not actually attend to details like selecting caterers or decorating the banquet hall. Honorary committees are usually

composed of people with clout who give an event status with the target audience, and membership frequently is determined by social and economic prominence. The committee's legwork is conducted behind the scenes by staff members who later present options to the committee. In fact, some honorary committees never meet at all. Members contribute to the effort (typically a fund-raising campaign) by meeting one-on-one with people in their areas and by lending their names to campaign literature.

When you are organizing an honorary committee, select a competent, polished staff member to act as assistant to the committee chair. This person should meet periodically with the chair to give a brief, well-organized progress report, determine the chair's wishes, and follow through accordingly. The staff member should be efficient but unobtrusive, and ready to give full credit to the honorary chair who will bask in the limelight and serve as toastmaster on the evening of the successful event.

Although the buck always stops with paid staffers, this is especially true with honorary committees. Always follow up suggestions and decisions made in committee meetings to be certain that action has really been taken. Check and double-check. Don't make the mistake of the staff member who discovered a few hours before a major banquet that the committee chair had not selected a menu as he had indicated he would!

Operating guidelines

A few basic guidelines will make working with committees easier and more productive.

- Establish a clear set of goals and objectives for the committee.
- Decide beforehand who will chair the committee and run each meeting. Selecting a lay person of stature to head your committee can open doors to your community's social world, give you political clout, and draw media attention to your project. But you do relinquish much of the control over the committee's management. Before the committee chair agrees to serve, he or she should be informed of the scope of the project, its budget limitations, and the level of commitment required in terms of time and financial resources.
- Distribute a written agenda at the beginning of each meeting and stick to it. Whenever possible, mail a preliminary agenda to all committee members at least two weeks before the meeting is to be held.
- Take minutes of each meeting and distribute them. This will help keep the group on track and eliminate questions about who agreed to do what and when.
- The chair should have the "moxie" to wield a firm gavel, limit circuitous discussion and argument, and make clear assignments of specific tasks to committee members when no volunteers come forward.
- Committee meetings should begin on time, end on time, and not waste time in the middle.
- Respect your chair as a professional and always be forthcoming with information related to the project.

Star power: The celebrity special event

It is inevitable that, at some point in the career of every special-events planner, someone will raise the idea of sponsoring a concert, a celebrity, a popular author, a lecturer, or a television personality. In a similar vein, around presidential election time, someone will suggest trying to attract candidates to campus for a debate, lecture, or rally. Commencement is a favorite time

for someone to suggest inviting the President of the United States to be the featured speaker.

While these kinds of special events can serve a genuine fund-raising purpose and can be of incomparable significance in public relations exposure for your institution, they do come with their own special headaches, and they do require additional planning and expertise that most in-house staffs do not have. Before heading down the path toward a special-events catastrophe, both financially and in public relations consequences, consider whether you can really handle events of this magnitude.

When properly managed, concerts and lectures by prominent personalities can generate large profits that give a quick boost to the scholarship fund or fatten the underwriting pot. There are, however, many trade-offs.

One midwestern university sponsors a concert appearance each year by a well-known comedian or singer. The concert is entirely managed by the alumni association staff and is held in the basketball arena. Through careful selection of talent and six months of dogged work to sell all the tickets, the concert planners have always generated a profit, which is used to fund scholarships. Consider, however, that the alumni director commits almost half his time over an eight-month period to planning and promoting the event. Without such a commitment the event would not come off successfully.

To arrange a concert or performance by any prominent entertainer, you will have to negotiate with the entertainer's agent. Hold on to your wits—many agents are wheeler-dealers and strictly "Hollywood." Negotiations can take weeks or months and involve many minute changes to contracts and delays in finalizing deals. Sometimes an agent will put your negotiations on hold while he or she tries to put together more attractive dates in better places or larger cities. Occasionally an agent will abruptly end discussion on a contract that has been in the works for months.

Negotiations for talent may involve hidden costs that spell the difference between financial success and ruin for novice contract negotiators. Frequently, the price listed as the fee for the talent is only the tip of the iceberg. Costs that can really add up include requests for certain brands of musical instruments, specially constructed stages and lighting, first-class airline transportation, limousine service, special foods and beverages, and a host of other goods and services.

Don't expect an agent to tell you these things unless you ask the right questions. Negotiating for entertainers is an art in itself.

Once you determine that the act you want is available and willing to commit to your date and place, don't rush to sign. First, take a hard look at the bottom line. Can you really afford to sponsor this event? Is it consistent with your mission and your overall public relations and special events plans for the year? What will it accomplish? Is it really worth the considerable time, expense, and risk?

Determine if the facility you plan to use can accommodate the entertainment, stages, sound system, special lighting, and props and still have enough space left for good seats. You will face expenses for security, insurance, extra help, advertising and promotion, and special equipment. After all these items have been budgeted, can tickets still be reasonably priced or will you literally price yourself out of the market?

Do you have enough lead time to promote the event adequately? What other major attractions are taking place in the vicinity that same evening? Will the entertainer be performing in your area at any time before the event? Will the act you have chosen appeal to your target audience or are you considering it because it's cheap? If you're not certain of the draw of an act, do an informal survey by phoning members of your target audience. Determine their opin-

ion of the act and ask what they'd be willing to pay to see it. Finally, don't sign any contract until it is reviewed by an attorney.

Using a promoter

An alternative to doing it yourself is to hire a concert or special-events promoter. A promoter will manage all aspects of talent hiring, event promotion, ticket sales, security, and facility management—in return for a sizable commission.

Before agreeing to do business with a promoter, research the firm carefully and check references. The promoter's first concern is making a profit, and you will be placing the good name of your institution in that person's hands.

Have the contract reviewed by an attorney and be sure you understand it. It should clearly spell out terms for every contingency, from how the event will be promoted to cancellation and refund policies and who will be responsible for what expenses. Know who is liable in case tickets don't sell well. Communicate your concerns about the type of advertising or promotion you consider inappropriate or offensive.

Undaunted? Then here are some additional tips:

- Allow as much lead time as possible. If you even think an event may take place, secure appropriate facilities, equipment, hotel space, and caterers. You can always cancel later if the event doesn't materialize.
- Don't hesitate to dicker, especially regarding the add-ons and extras that run up costs.
- Never accept a verbal commitment or agreement. Get everything in writing. If the person you are dealing with does not supply such written documentation, send a memo listing the agreed-to deadlines, prices, and services to be provided, and ask the promoter to sign and return one copy.
- Don't be intimidated by titles or name-dropping.
- Stay calm. Follow the same systematic, professional approach you have practiced with other special events.

Pomp, protocol, and the Secret Service: Government officials as your guests

When a government official at cabinet level or above is your guest or featured speaker, you will spend many hours dealing with an advance team and, for some officials and candidates, with members of the Secret Service.

Advance teams travel from city to city making certain all preparations are in order before the arrival of the official. This advance team will take over virtually all aspects of the visit, from scheduling to reviewing menus to arranging security. Make yourself available. Be prepared to answer every question and carry out directions quickly and completely.

The higher the official the longer you must wait to get a firm acceptance, and the greater the chance you will get bumped for another opportunity or a political crisis. Plan for a backup program if the official must cancel.

You will also have to cover the costs of the special arrangements required, find sources at the last minute, and often pay a premium for them. These can run the gamut from boosting electrical power for media equipment to renting a particular color backdrape—your color scheme may be gold and green but the President must appear before TV-compatible blue.

Unfortunately, until you have a firm commitment from the official, you probably will not receive any guidance or information on these special events. Your best strategy may be to call the special-events planner at another institution that has hosted a person of similar rank and glean every bit of information possible.

Develop, as well as you can, a projected budget estimating the additional expenses associated with the VIP's appearance. And draw up a plan for acquiring the money to cover it. Luckily, many corporate and private donors are eager to have their names associated with the appearance of an important official.

In the chaotic preparation for such a visit, it will seem as if the demands and long hours will never end, but afterward, as you're basking in the glow of a successful major event, it will all seem worthwhile.

Insurance and liability

The necessity of insuring your institution against the risks of special events is, unfortunately, a fact of life. Generally speaking, if you are hosting a small, university-sponsored gathering on university property, the institution's regular insurance should cover you in case of an accident (a guest slipping on the entry tiles) or misfortune (a guest's fur coat being stolen). But in other cases, your event will not be covered.

Most colleges and universities today have a risk manager who is responsible for the institution's insurance needs. Consult that person in the early planning stages to be sure that you arrange and budget for any extra insurance.

In some cases, a "rider," which is a temporarily stipulated set of conditions, can be attached to existing policies on an event-by-event basis. Where the group sponsoring the event is not directly a part of the institution, such as the Alumni Class of '62, it should be added to the institution's policy as an "additional insured." Even something as seemingly straightforward as hiring a bus to shuttle alumni to and from the stadium requires a check on coverage.

Liability concerning consumption of alcoholic beverages is a growing concern among special-events planners. According to Washington, D.C., insurance broker Huntington T. Block, most general liability policies include host liquor liability. That means, if you aren't in the business of selling liquor—if you give it away—your existing policy should provide coverage. This is also true if your event includes a cash bar at a hotel where all proceeds from the sale of liquor go to the hotel. But if you plan to go to the local liquor store, stock the bar, and sell the drinks yourself, you're facing a very different insurance situation. However, state laws change frequently and court decisions complicate the situation. A check with the risk manager is always in order.

Major special events that attract large crowds, such as rock concerts, arts festivals, carnivals, and marathons, require extra insurance. Determining the coverage needed, finding an insurer to write the policy, and calculating the size of your premium all take time, so be sure your institution's risk manager is involved early. You may even find you have to alter your plans if coverage is unavailable or wildly expensive.

Jurg W. Mattman, president of a security consulting company that specializes in insuring special events, has many suggestions for ways to keep premiums down. Among other ideas in an article appearing in *Public Relations Journal* in March 1987, he suggests hiring a security company to inspect your plans and facility and to identify and eliminate as many risks beforehand as possible. (Jurg W. Mattman, "Checklist: Securing and Insuring Special Events," *Public Relations Journal*, March 1987, p. 30)

Style: Some have it, some don't

Style is that illusive quality that makes special events stand out. It is the intangible ingredient in this complex planning mix that makes the difference between flat and fantastic, between an event people will remember and talk about long after it is over and one they will have forgotten by the next evening.

In *Planning the Big Bash,* Oliver Prior, a special-events planner for high-ranking government officials and other notables, says that style is not:

> a collection of trappings to be hung on the wall or spread around. It is not gaudy. It is certainly not an affectation. It does not preen. It does not even show. In fact, it is only conspicuous by not seeming to be there at all. (Oliver Prior, *Planning the Big Bash* (New York: Caxton, 1983), p. iv)

Style comes from devoting the same care to the tiniest detail behind the scenes that you use to select a speaker or a hall. It is a blend of creativity and imagination that, when well cultivated, becomes your signature on every event you stage.

Develop your own style by studying what other special-events planners do. Read books such as Martha Stewart's *Entertaining,* and bone up on proper etiquette in all special-events situations with *Letitia Baldrige's Complete Guide to Executive Manners* (see Bibliography). Familiarize yourself with trends in foods, wines, music, and decorating. Incorporate these trends into the traditions of your school, college, or university and don't be afraid to try new approaches to "old" events.

People love presents and a well-planned special event is a kind of present. You want your guests to have all the pleasure of opening a pretty package to find a wonderful surprise. With practice, you can begin to develop a sense of what elements constitute a well-planned, well-organized affair that is tastefully and graciously executed. You can begin to recognize those components that make up style.

It doesn't matter if you're planning a homecoming luncheon for the fourteenth year in a row or a completely new black-tie gala to launch a major capital campaign. Your guests will notice and appreciate the time you took to make the event extra-special—whether it is favors made for the occasion, a creative theme, or imaginative decorations. As Prior says:

> Style begins with simple respect for the other person. It runs on discipline and ends with promptness. That other person happens to be your guest. You owe him more than a couple hours of boredom. He owes you, your program, or your cause...nothing. (Prior, *Planning the Big Bash,* p. v)

Making it work

You don't need a degree in hotel and restaurant management to make arrangements for special events, but it does help if you develop a working knowledge of the terminology and standard procedures.

Whether you are planning an event in your university union or at a posh resort hotel, the planning details and the sequence of decisions are essentially the same:

1. Be certain that the purpose of your function has been clearly defined.
2. Identify the goals and objectives of the event.

3. Develop a fairly accurate idea of the number of people planning to attend.
4. Select an appropriate facility that is compatible with your budget.
5. Construct an outline of all the elements to incorporate, from promotion and registration to audio-visuals and insurance.
6. Decide on food, beverages, and entertainment.
7. Determine the theme, color, and the decoration scheme.
8. Prepare an order of events, timed to the minute.
9. Plan the billing process and follow-up procedures.

Now, think small. Concentrate on the details of *everything*. Good special-events planners are perfectionists with a flair for precision and minutiae.

Picture yourself taking part in this event from the moment you receive the invitation: Imagine how you will respond, how you will travel to the event, where you will park, the route you will walk, what you will see upon entering, who will greet you, what you will do next, what you will eat, what it will be served on, what you will drink and what you will drink from, how the program will be introduced, what the lighting will look like, how the event will be concluded, and how you will depart.

Success hinges on attention to detail. And coordinating the hundreds of details involved in a special event is an enormous task.

Different people have different methods for keeping details straight. Among these are check-off sheets, notebooks, and daily files. As you gain experience, you will no doubt develop a system particularly suited to your work style. I use a daily file system where I file notes for everything that must be accomplished according to date.

But the number one secret to success is good communication. It is impossible to pull off a successful event by yourself. Good, solid planning involves hours of behind-the-scenes brainstorming, meetings, explaining, selling, and coordinating to make certain everything and everybody wind up in exactly the right place at exactly the right time.

To help accomplish this, delegate as many details as possible to the experts in each area and keep a stream of communication going between yourself and the committee, the caterer, the florist, the entertainers, the printer, campus VIPs, maintenance staff, the equipment rental firm, security personnel, and anyone else who has a role in the event. All must be kept up-to-date and constantly reminded of their responsibilities. Good communication increases the commitment of all concerned by emphasizing their importance to the success of the event.

Chapter 2

Spreading the Word: Invitations and Publicity

When your invitation arrives in the mail, it must compete with the junk mail, bills, solicitations, and personal mail that deluge the typical "occupant." Your invitation must stand out in that fistful of mail and say "open me" and "read me." Yet at the same time, it must be consistent with your event and your institution's image. That's a tough assignment to meet.

Your invitation creates the first impression most people will have of your special event. Often it provides the only information they will have on which to decide whether or not to attend. Help make that decision a positive one by using your invitation to create excitement about your event and to answer any questions they might have.

Space is at a premium, so choose your words, graphic elements, and presentation carefully. Your printer or typesetter can advise you on basic invitations. For more complicated or creative invitation ideas, seek out a graphic artist for suggestions on design and layout. The way your invitation looks—"sophisticated," "important," "fun," or "boring"—often does more to convey the tone and character of your event than do the words, which have to convey hard facts such as time, place, and cost.

To help your invitation stay out of the wastebasket, give your recipient a reason to open the envelope. Sometimes you can do this with a gimmick that will pique his or her curiosity, but unless you are fairly expert at direct mail, this is a hard trick to pull off.

A much better way to get your invitation opened is to make it look like that increasingly rare item, a personal letter. A photocopied flyer says "potato chips and a keg of draft beer." If that is the type of event you are having, then by all means use a flyer. But most events set a higher standard; after all, that is what makes them "special events."

Start with quality stationery. You are communicating a quality event, to quality people, for quality results. Be consistent.

Hand-address the envelopes; never use computer labels. Your recipient knows that computers spit out junk mail, people address envelopes. Most junk mail is never opened. Virtually all handwritten mail is opened and read.

Use a stamp, preferably an attractive commemorative stamp and not a generic denomination. Never use a postage meter. Again, you want to make your envelope look as much like a personal letter as possible. Junk mail and bills come with a bulk rate or meter mark. Some business mail comes with generic stamps. But in a case where correspondence really needs

to stand out, buy and use commemorative stamps for your invitations.

The invitation itself should include who, what, when, where, and how much. Be specific about the site of your function, particularly if it is at a hotel chain that has more than one property in your city. It might even be wise to include a map identifying your location, particularly if guests from out of town will attend.

Give consideration to extra-creative invitations as a way to capture the attention of VIPs and to generate publicity for your event. One university sought money to support its collection of French art. The event planners chose a Parisian cafe theme and surprised prospective guests by having a "French" waiter deliver each invitation tucked into a basket of freshly baked croissants. Another university sent singing messengers to each guest's doorstep with the invitation to a musical event. Such creativity costs time and money but often pays great dividends if you can match an appropriate promotion to your event.

A response mechanism is an integral part of every invitation. Sometimes it is simply a phone number for call-in responses. Most of the time it will be a reply card and a self-addressed envelope. If you are asking for payment with the reply card, make sure that the envelope is large enough to hold both the card and a check.

If the event is a fund raiser, it is particularly important to include a card and return envelope. Some people who are not willing or able to attend the event may wish to make a contribution. Your response card and envelope make it easy for them to do so.

When planning a formal event and invitation, consult an etiquette book for proper format and for proper titles and salutations for your guests.

Check postal regulations for size and weight to make sure that your invitation meets standards and will require no extra postage. Your invitation could be too small, too large, too flimsy, or lacking a return address. It can be rejected for any of these reasons.

When to mail invitations

For a major event, consider sending a "mark the date" card as soon as you have targeted a date. In some instances that could be as much as six to eight months or even a year in advance of the event. This card says that your organization is planning to have a function on thus-and-so date, mentions the name and nature of the event, and asks the person to reserve the date on the calendar. State that a formal invitation will follow.

The timing of the mailing of invitations should depend on your audience, the nature of the event, whether you're inviting only local people, and your own planning requirements. Four weeks ahead may be fine for a local group; if you mail too early, people will set your invitation aside while they wait to see what other obligations or invitations come up. But four weeks may be insufficient for out-of-town guests. Although you should stick to the etiquette book for invitations to very formal affairs, the timing of other invitations to generate maximum attendance takes both experimentation and guesswork.

For some events, such as an ongoing luncheon lecture series or a late afternoon cocktail party to meet a new coach, less than three weeks' notice may result in more participation. At one medical college, invitations, issued one week before a monthly luncheon for doctors, generated an excellent response; mailed earlier, the invitations were ignored.

Repondez s'il vous plait

RSVP means "please reply," but many people do not, especially if they are not planning to at-

tend. Assuming that no response equals a "no" can be a risky business, however, even though it often seems to hold true. If you are within a few days of an event and have many responses outstanding, one option is to call those people and inquire about their intentions.

Another way to collect responses is to put "regrets only" and a phone number in the lower left-hand corner of the invitation. People are supposed to call if they are not coming and if you don't hear from them, you can presume they're coming. Of course, many people will ignore this request as well, and your counts for food and beverage can be way off.

If you experience great difficulty in getting responses, don't feel alone. Even Letitia Baldrige has noted a growing "RSVP problem." Many, many people—of all social stations—simply do not respond to invitations, whether they plan to show up or not.

An even more serious problem for event planners is the no-show—people who accept an invitation and then change their minds without bothering to inform you. At one black-tie benefit dinner, almost half of the 150 who had accepted failed to appear. You may find it necessary to call guests two or three days before your special event to confirm their plans as tactfully as you can.

Guest lists: Keeping track of your friends

Keep guest lists updated with correct titles, addresses, phone numbers, and spouses' names. Never let old information sit in a file to be corrected later; it is too easy to forget to do it, and, inevitably, you will embarrass yourself by mailing an invitation to an old address or by including the name of an ex-spouse.

Maintaining guest lists on a personal computer allows you to track and organize a large amount of information and to print out a complete, orderly list of guests at the last minute. Your data file can include information on invitations extended and accepted. The computer can assist you in tracking and scheduling your guests so that you do not invite the same people time and again to the same kinds of functions or invite people to back-to-back events. On days when several offices may be inviting guests, compare lists to be certain you have not duplicated names.

Your computerized guest files should be set up to record and access the following information:

- both spouses' complete names;
- both spouses' business or professional affiliations;
- home address;
- home phone;
- business addresses;
- business phones;
- donor level;
- connection with the institution (guest's or spouse's graduating class and school and/or that of their children);
- special interests, such as music, art, theater, athletics, or another academic area;
- important personal information, such as food preferences or need for a handicapped parking permit; and
- record of invitations extended and accepted.

Tickets

Tickets are probably the most efficient, least expensive method of controlling costs, guaranteeing revenue, and sorting out the cast of characters.

If you have contracted to use a facility such as a theater, auditorium, or the stadium on your own campus, these types of facilities usually have a full-time ticket office and staff. Managing tickets for a large event, such as a concert or a celebrity appearance, is a monumental job. Don't assume that your staff has the time or expertise to do it. Negotiate with the ticket staff of the facility to have them manage tickets for you. In fact, many large facilities require that you use their staff as part of the rental agreement. This protects them from a "bad rap" in case tickets are mismanaged, and it frees you and your staff to concentrate on other things.

For small-scale events, such as banquets or on-campus lectures, tickets serve as income guarantees and help provide security so that only paying guests gain access. For these kinds of events, you can probably manage tickets on your own with the help of diligent staff members and a personal computer.

Tickets should be mailed the same day that each order or affirmative RSVP arrives. When people accept too close to the date of the event to receive tickets by mail, call them and explain that their tickets will be held at a "will call" window at the door.

Whether the event is paid or free, you should keep an accurate record of all responses to invitations, both positive and negative. Record the date tickets are mailed as well as all money received. An alphabetical list of guests who have been mailed tickets and others who have clearance to enter should be available at the door. This allows staff to check tickets as people arrive and prevent crashers from entering. Instruct your staff on the procedure to follow if a person insists upon admission but is not on the list.

Decide beforehand whether or not you will mail tickets to those who sent no payment or inadequate payment with their RSVPs. Set a firm policy about ticket sales at the door. Handling ticket money at the door requires additional staff to keep traffic flowing. You'll also need supplies such as change, a card imprinter if you are accepting credit cards, a telephone for charge and check verification, a cash box, and receipts.

Pricing

When you are pricing tickets, take all expenses into account, tally them, and divide by the total capacity of the facility. This will give you the per person cost of the event. Multiply by two. This number is the minimum price you can charge per ticket and expect to break even—that is, if you're lucky and unanticipated expenses don't run high. When calculating expenses, always remember to include less obvious expenses, such as complimentary tickets for VIPs, overtime pay for security, and cost overruns due to missed deadlines and last-minute extras.

Remember that for this formula to keep you out of red ink, you need to sell *all* available tickets. Many a special-events planner has been in hot water because ticket sales did not meet projections, yet expenses still had to be covered. You should consider the consequences of this possibility before you commit to an event. If breaking even or losing money will ruin your special-events budget for the entire year, or if you have no resources to cover deficits, either scrap the event or find a co-sponsor to share or offset some of the costs.

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Comps: For control and PR

Tickets can also be used very effectively as a public relations tool and as a discreet means for staff to identify VIPs in a crowd. At the annual Memorial Golf Tournament at Muirfield Village Golf Club in Dublin, Ohio, one of the most coveted tickets is not a tournament admission ticket, but a ticket to the private villa of tournament host Jack Nicklaus. VIPs from around the country are mailed the prestigious tickets that admit them to the exclusive villa for red-carpet treatment including gourmet hors d'oeuvres, drinks, and the chance to rub elbows with celebrities and other special guests—not to mention the status of being seen entering the place.

You can employ the same concept on your campus by mailing VIP tickets or passes good for admission to special hospitality rooms, to a reception hosted by the president, to a backstage cast party after a theater performance, to an autograph session with a visiting author. This is a particularly effective technique when staffers don't know guests. Write the guest's name on the back of the ticket before mailing it. At the event you can quickly check ticket backs to see which invited guests attend. Use this information during the event to be sure important people are appropriately greeted and use the list afterward as a record of contact with your VIPs.

Always make these VIP tickets "nontransferable" so they cannot be passed along to others. My husband and I once served as the host couple in a private indoor box at the university football stadium. Our guests that day were to have been a very wealthy, socially prominent couple from out of town. When they accepted their invitation, their passes and necessary admission credentials were mailed—but not marked nontransferable. On the day of the game, kick-off came and went, but our guests had not arrived. Halfway through the first quarter, instead of Mr. and Mrs. Prominent Donor, a teenaged couple dressed in scruffy jeans appeared. To our dismay, we discovered that Mr. and Mrs. Donor had passed the tickets along to friends, who had passed them on to friends, who had passed them on to a third friend who gave them to his son.

Graphics

Package each special event graphically by means of coordinated printed materials that express the event's theme through color, paper, type, logo, and design. Work with a graphic designer and printer to develop a package to fit your budget.

Once a design is selected, everything should match, including invitations, response cards, tickets, decorations, promotional flyers, posters, menu cards, and programs.

As Oliver Prior says in *Planning the Big Bash*, "Graphics are the footprint of the event. Comprised of all the printed materials required, and normally distributed in sequence, they become the trail you leave behind. So take care." (Oliver Prior, *Planning the Big Bash* (New York: Caxton, 1983), p. 70)

Programs

Frequently a program is printed with the intention that it will become a memento of an event. If your event is a banquet, leave a program with each place setting to be certain everyone receives a copy.

The program should contain the order of events, a brief biography and photo of each guest of honor, background information about the event and its theme, recognition of the planning committee members, and a mention of all sponsors.

Mementos

There are many companies across the country specializing in souvenir items especially for the college market. You can "personalize" anything from plastic key rings to etched glassware to commemorate your special event.

Souvenirs are a nice extra touch and are fun to receive. When selecting souvenir items, try to choose something that is useful, tasteful, and somewhat relevant to the event. Check with event planners in other offices to see if you can order the same item for several functions (assuming there won't be much duplication of audiences) and divide the savings. Order well in advance.

Awards and certificates

A traditional part of many special-event ceremonies is the presentation of an award, trophy, certificate, or gift to the honored guest. In the past, silver trays, bowls, and loving cups were the traditional presentation items, but their expense and impracticality have greatly diminished their popularity.

All awards should bear the institution's full name and academic seal or motto and the date of presentation. Strive to make awards unique to your school, college, or university.

Formulate a master plan for awards, determine what items will be given for each presentation, and order a quantity of that item. For the most formal, prestigious recognitions, some institutions strike a medal with the academic seal on one side and the award name on the other. Hung on a neck ribbon of the institution's colors, medals make very attractive tokens and are perfect for the recipient to wear with academic regalia on future occasions. An attractive engraved certificate in a presentation folder should accompany each medal and should bear the recipient's name, the date, and the award name.

If a citation or proclamation is to be prepared for the honored guest, it should be written in calligraphy, embossed with the official university seal, and framed.

If the recognition item you have chosen is a plaque, select a model that can be engraved with the recipient's name.

Here are some additional planning tips:

- Order recognition items very early in the planning process. When ordering a quantity of items for a one-time event, always order at least two extras.
- Check engraving for correct spelling and dates.
- Don't give personal items such as clothing. When staff or coworkers have collected money to purchase a gift for an outgoing official, present the gift privately rather than at the podium during a banquet or ceremony.
- Remember to build the cost of recognition items into the special-events budget.
- Practice the presentation ceremony, especially if an item such as a hood or medal must be placed over the recipient's head. Inform the recipient if he or she should be prepared to speak after the presentation.

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Build excitement with promotion and publicity

Most colleges and universities have a public relations or news service office responsible for arranging all contact with the media and for orchestrating publicity about campus events. This is meant to assure that the institution "speaks with one voice." Make contact with the public relations or news service staff early in the special-events planning process. Solicit their suggestions on publicity and review the news releases and press material they prepare.

Publicity is the art of creating an awareness of and an appreciation for a special event, not only among members of the working press, but in the minds of the target audience and the community in general. Publicity requires research, planning, and careful attention to detail. It is difficult for many special-events planners to accept the fact that, from a newspaper editor's point of view, most special events are *not* newsworthy.

Oliver Prior says, "Most special events, particularly if they are invited affairs, receive their principal publicity after the fact, not before." (Prior, *Planning the Big Bash*, p. 114) The major scholarship banquet you have spent six months planning may not get a sniff from the local editor before it happens, but when it is announced that a prominent local business person presented a $1-million check that evening, you can bet there will be a story and photo in the next day's paper.

The first step in planning publicity is to determine what kind, if any, is needed. Determine who will be interested in the news, what aspects of the news will be useful to them, and how to reach these people. Plan publicity to further your objectives; then direct information to the most appropriate outlets, whether print, radio, or television. Tailor the message to media deadlines and style. Plan publicity in proportion to the need. A few well-placed phone calls and personal visits may be sufficient to bolster attendance at a banquet, whereas a full-scale publicity campaign may be needed to create excitement for a major art exhibition.

Early in the special-events planning process, develop a publicity schedule for news releases, photos, and announcements. Identify the appropriate media outlets for the information and contact them.

Schedule publicity to attain repeated mentions. Don't rely on one news release to make a single big splash for you. Announce the main speaker; then announce honored guests; then, immediately before the big day, follow up with details of the program. Send stories to the hometown newspapers of speakers and recipients of degrees or awards. For coverage during the event, use a photo release—an 8 x 10 glossy taken at the event and accompanied by a cutline that is delivered to the newspaper office that day for the next day's paper.

When you are sponsoring a special event that lasts for several days or a week, such as a conference on genetics research or a symposium on the arts, you should report on proceedings with daily news releases.

Support publicity

If your objective is to drum up hometown awareness of your event, you can use support publicity such as slogans on bank message boards, motel marquees, and pick up literature placed at high-traffic areas such as convenience stores, banks, fast-food restaurants, the local library, and the convention and visitors bureau. Make arrangements to have a promotional message printed on grocery store receipt tapes, milk cartons, and grocery sacks. If your town has a phone-in time and temperature message, ask to have a promotional spot recorded on it. Posters, table tents in restaurants, billboards, and bill stuffers are additional options.

For very special occasions, such as an important anniversary of the founding of your institution, consider buying a supplement in the area's most widely read Sunday newspaper.

When the success of an event hinges on ticket sales, investigate purchasing ads in area media and remember not to overlook campus media.

Campus media

Campus media, such as student newspapers, faculty and staff periodicals, and campus radio and television stations, are important outlets.

Develop on-campus interest in a major special event through a progression of stories in the campus press. Maintain a constant flow of news, including coverage of your committee's progress and exclusive interviews with event leaders.

Find out which parts of the campus newspaper are most read by the audience segment you want to reach. On some campuses, students turn immediately to the classified ads, while faculty go directly to page two. Even if you have to purchase advertising space, position your message where it is most likely to be read by the people you want to address.

Also use the informal news outlets that are popular on your campus, such as message and bulletin boards or student mailboxes.

Treat campus media people as equals to external media people by inviting them to all press conferences and briefings and by placing them on the mailing list for news releases. But don't expect student media to be invariably favorable in their reporting just because they're on campus. In fact, they can be more critical than external media.

Grassroots support

Gaining grassroots support and tapping into the informal networks that exist on most campuses can make an event take off. Getting the attention and support of opinion leaders who can then legitimize the event with their constituents is often far more effective than hundreds of dollars spent on publicity and advertising.

Determine how information is channeled on your campus; then figure out how to make the system work for you. For example, the support of the students in the Greek system may be the key to a large turnout and high visibility. Often, the opinions of elected student leaders carry clout.

Faculty and staff also have informal communication networks. In some cases, you need to gain the endorsement of faculty governance bodies or of the dean of each college. Inviting the leaders of each campus constituency to a luncheon to explain the special-events plans and asking for their endorsement might work on your campus.

Begin working with the campus "underground" before you need it. Never underestimate its power to make or break you.

Publicity stunts

One technique that should be used cautiously and infrequently is the publicity stunt. Intended to generate photos or television footage that piques interest in an event, stunts must be offbeat, but not too crazy or offensive. For example, students building a mile-long ice cream sun-

dae to call attention to a charitable fund-raising project would be a full-fledged stunt that merited notifying the media in advance.

On the other hand, the college president smoothing the last batch of concrete on the walk into a new building to call attention to dedication ceremonies could more accurately be termed a publicity shot and does not warrant an invitation to the media. Instead, have the campus photographer take the photo and mail it to the media with an accompanying cutline or release and an invitation to attend formal dedication ceremonies.

Before agreeing to a stunt, remember that the personality of the stunt must match the personality of the event. Always check legal ramifications of stunts, particularly those that pose a risk of physical harm.

Press parties

A press party before an event can be an effective tool for developing media interest. Such functions are particularly useful for providing sneak previews of new facilities, art collections, scientific discoveries, and theatrical performances. The press party is intended for members of the media in the hope that they will convey your story in a favorable light. There are, however, no guarantees.

Determine your message, decide on the most appropriate media outlets for your news, and send media representatives an official invitation. Plan to supply good food and drink and, if necessary, accommodations. Press parties can take the form of an open house, a hard-hat inspection, or an exclusive showing. They can provide time for members of the press to try out a product or facility—such as spending a day working out in the new student recreation center or viewing the exhibits in the new gallery.

Amid the fun of a press party, be sure to deliver your message and plan to distribute press kits. A souvenir of the event imprinted with the special-event logo is appropriate, but do not give expensive gifts or special privileges that could be construed as an attempt to "buy" the support of a reporter.

Realize that a reporter's job is to report the news objectively, so don't be surprised if the publicity generated by a press party contains a mix of compliment and criticism.

Press conferences

On certain occasions, a press conference may be an important component of an overall publicity plan. Press conferences should be reserved for hard news, and credibility is key. The idea of a press conference is to provide a forum for the delivery of important announcements that are considered breaking news. The press conference gives all media an equal opportunity to hear and report the news.

Telephone invitations to a press conference a day or two ahead. Try to schedule the conference for a mid-morning on a Tuesday, Wednesday, or Thursday. Mid-morning gives the evening newspaper and television news programs time to use your story that day. Midweek days are preferable so that your story doesn't sit over a weekend.

The press conference room should be large and well-lit, with plenty of electrical outlets. Position the person to be interviewed in front of a backdrop, such as your institution's logo, and have a table for microphones and tape recorders in front of the podium. Have chairs arranged theater-style and allow an aisle at least five feet wide in the back of the room, perhaps

with a riser, for television camera crews.

A press conference must have an agenda with a specified beginning and ending time. Included on the schedule should be a brief introduction of the featured speaker, the speaker's announcement or remarks, and a question-and-answer period. Respect media deadlines and keep the press conference on schedule.

Have refreshments such as coffee and soft drinks available in the room.

Supply a press kit—a packet of prepared information that reporters can use as background in preparing their stories. The press kit should contain a news release and a copy of the remarks or speech made during the press conference, along with some general information about the institution and biographical information on the speaker. Additional background information about an upcoming event can help generate stories. Include a copy of the event program; biographies and pictures of principal speakers, honored guests, and VIPs; a copy of citations that will be read; information about event sponsors and members of the event-planning committee; and the names and telephone numbers of institution or public relations officials to contact for more information.

If possible, have a quiet, private room ready for reporters to conduct in-depth interviews at the conclusion of the press conference.

There are several potential drawbacks of holding a press conference. First, poor attendance on the part of the media is embarrassing and makes it appear that your news is not important. Second, the press can grill your VIP and then generate stories that are very different from what you had envisioned. Third, the media representatives may decide that your event isn't really news. It can be difficult for an institution to recover from this kind of credibility-damaging experience.

The press room

Special events that feature a number of dignitaries, celebrities, and attractions may require a press room.

A press room serves as headquarters for the media on campus. It should be easily accessible, centrally located, and staffed at all times. The press room should contain telephones; typewriters; tables; supplies such as pens, pencils, and paper; a copy machine; electrical outlets near the telephones for computer hook-ups; all tickets, badges, and identification needed for admission to events; photos, releases, and copies of speeches; and background information on all speakers and honored guests.

There should be a separate, quiet room available for interviews as well as a staff of eager messengers ready to shuttle people to and from events and to deliver messages from editors' desks to reporters on assignment. Journalism students are usually delighted to serve as messengers in exchange for the experience of associating with the working press. Be sure to:

- Invite the media to your event and provide them with good seats.
- Send your news to the wire services and make use of the "daily feed" for radio.
- Call reporters when you think you have news they can use or when you want to encourage coverage from particular reporters.
- Make faculty experts available to the media to comment on special events and to provide background information for stories.
- Offer to arrange interviews and photos.

Chapter 3

Find a Place, Get Comfortable

The facility you choose can make or break an event. Use your imagination to choose a facility that will advance your theme and provide additional incentive to attend the event. Take advantage of the lure of a place that is not open to the general public. An invitation to the president's home is a draw on most campuses. So is an invitation to a grand private home or club. Or go for the offbeat, as did the California brokerage firm that made national news by hosting a black-tie dinner at the abandoned Alcatraz Prison.

One of the most successful luncheons I ever planned for an alumni association board was an outdoor picnic on a beautiful May weekend. Fresh air and sunshine with food presented in individual baskets was a refreshing break from a long meeting and a pleasant change from the traditional formal luncheon.

For some special events, facilities are the raison d'etre. A fund raiser to build a new savannah for the zoo's African animals could appropriately be held outdoors after hours at the zoo.

When choosing a facility, think first of the purpose of your gathering. Obviously, the needs are quite different for a workshop where every participant will use a personal computer than they are for an art festival. Make a list of facilities on your campus and in your area that might meet your needs; then do some legwork.

Schedule an appointment and visit each site. Ask the facility's manager about capacity for the type of function you are considering (the same room can hold more people for a stand-up reception than for a sit-down dinner); what auxiliary services are available; and what provisions need to be made for food service, parking, and security. Some places require that you use their personnel and services; others have none available; and still others have a list of approved vendors from which you must choose. Ask about rental rates, availability, and time for set up, if you need it. Be certain to see the rooms you will actually be using, not a "sample" or "typical" room. Initiating a face-to-face relationship with the facility manager and staff will also help you get better service as you go through the planning and execution of your event.

Each facility has its own personality conducive to certain types of events. Don't try to stage an elegant black-tie gala in a broken-down gymnasium. By the same token, don't invite guests to the country club and serve a luncheon of jumbo shrimp and imported wine when you are trying to communicate the university's budget crisis.

Remember that the tone of your event—the setting and presentation—must be consistent with its purpose. Don't undercut your message with confusing inconsistencies.

When you visit a facility, try to picture it as your guests will see it and at the time of day or night they will be using it. How does it look from the outside? What style is conveyed by

the decor? Do the meeting rooms have windows? If so, what will your guests see?

We once held a one-day executive retreat to discuss some very serious issues. The site was a renovated Victorian mansion in the heart of a large city. Everything was strictly first-class—the grounds, the interior, the meeting rooms, the food, and service. But unfortunately, several "hourly hotels" lined the other side of the street, and the "ladies" were much in evidence. As our guests arrived, everyone made mention of the women. By lunchtime, jokes about them dotted conversation to the point of distraction. When our guests look back on this event, I'm sure they remember the presence of those women more than any feature of that facility.

If you're in the habit of using the same campus facility over and over again, perhaps you should take a fresh look at it before holding your next event there. Visit the facility and look at it as if you were a guest on a first visit. Is the route from the parking lot to the front door clean and pleasant? Is the name of the building clearly visible? Are pathways and directions plainly marked? Is there a receptionist or an easy-to-decipher directory inside the front door? Do graffiti, litter, or tattered furniture clutter the hallways?

Are the rooms clean, the furniture in good repair, the air fresh? Sit on the chairs. Is the light adequate for reading? Check the air conditioning for drafts. Your guests will be sitting or standing at your function in that room, in those chairs, with that lighting: Would *you* be comfortable doing what you will be asking your guests to do?

What feeling do you get from the room? Is it dark and depressing or attractive and properly lit? Does everything work? Can it comfortably accommodate your group? Find out what other groups will be using the facility that same day and if they are compatible. We once inadvertently planned an alumni college for the same week as a high school cheerleading camp. By week's end, our middle-aged participants had learned countless new cheers—at all hours of the day and night!

Events in unusual places

Inject some imagination into the selection of the setting for your event. Perhaps the facility you have chosen has a beautiful garden. Maybe there is a spot on campus with a particularly attractive view, or perhaps there is a pleasant room not usually used for entertaining that could be transformed for that purpose.

But, to avoid unpleasant surprises, always make a site visit and thoroughly talk through your ideas with the person in charge. I once staged an elegant candlelight reception following a performance by a rising opera star. It was the first time we used the choral rehearsal room for entertaining. We incorporated the musical instruments, music stands, and chairs normally stored in the room as part of our theme. The grand piano became one of the decorating focal points. Things went beautifully until guests began setting their empty champagne flutes and dirty plates on the piano. This greatly agitated the music department administrator and his comments embarrassed several of our guests. The situation could have been avoided if I had had a more thorough discussion with him before planning to use the room.

Scheduling events in unusual places offers both pros and cons. On the positive side, the event will be more interesting and novel and therefore will remain in people's memories far longer. On the negative side, when you schedule an event for an unusual place, you substantially increase the chances that mistakes will occur and unexpected things will go wrong.

Ask yourself a few questions before committing to an unusual spot:

- Does the location make sense? Does it support your goals and will it make a positive impression?

- Can you afford to budget for the additional costs of moving the necessary equipment and staff to the location?
- If outdoors, could weather or insects become a factor? If it rains, do you have an alternative facility readily available? How would you notify guests of such a change?
- Can the caterer do a good job in that location? If there is no provision for electricity or water, you may have problems.
- If you're planning an evening event, how will you light the area?
- Is the area secure?
- Is there parking nearby? Are there restroom facilities?
- Do your plans comply with applicable fire codes and regulations concerning consumption of alcoholic beverages?
- Do you need any special permits?

Arranging the furniture: The set-up

As a special-events planner, you will be involved with many different types of functions. Each requires a "set-up," an arrangement of furniture and props that will provide maximum comfort for your guests and best fulfill the purpose of your event. Your set-up should facilitate crowd flow, complement the setting you have chosen, and make the most of decorations. Determining the set-up requires going to the room to see what's there and arranging and rearranging the furniture, at least on paper if not physically.

Seek the advice of the staff at the facility you have chosen. They have seen many groups come and go and can offer ideas and suggestions to help you achieve the best set-up for the needs of your particular function.

Consider the sequence of events during your function. Do people need to be able to move freely from one place to another? A common mistake is situating reception tables or bars in places that block traffic. Locate these stations so that people can come and go easily. An enticing display, entertainment, or a reception line placed on the opposite side of the room will help keep traffic moving.

Think about what you are expecting guests to do during the function. I once attended a charity auction where the items to be sold were displayed on long tables. Unfortunately, the tables were so close together that it was impossible to examine items and place bids. As a result, I suspect many bids were lost because people simply weren't willing to fight the crowd. Another technique for keeping knots from forming is to have a receptionist at a registration table greet guests and then direct them to another locale immediately. Place welcoming coffee and rolls well away from registration tables.

The set-up should maximize the beauty of the facility and give a neat, well-organized appearance. If you have been forced to use a room that is much too large, divide it with portable screens, draped rails, or large potted plants. This will help avoid the impression that your event is not well attended.

Hotels and conference facilities use formulas based on particular set-up styles to calculate seating capacities for each room. These figures represent the maximum capacity and don't provide for space lost to head tables, audio-visual equipment, displays, or registration tables. Consider the capacity figures provided by the site's staff, but remember to take into account the special needs of your special event.

To maximize their catering profits, hotels and banquet halls rely on a glove-like fit of people to space. Don't expect a facility manager to assign a room that is far more spacious than

is dictated by the number of guests you are expecting—unless you are willing to pay extra for it. Although hotels sometimes do not charge for the room itself—as they make their money principally from food and beverage service—you should expect to pay a rental or at least a set-up fee for each room you use.

Here are some guidelines for calculating capacity for common set-ups.

Theater or auditorium style

This is probably the most commonly used set-up for lectures and speakers. Chairs are arranged in rows facing a podium. Plan to leave two four-foot side aisles, a five-foot center aisle, and a five-foot front aisle so that people can get in and out easily. Be certain that the people in the back row can see and hear. If there is any doubt, place the podium or speaker's table on a riser and arrange for a good sound system. To calculate the number of people who can fit into a room theater-style, multiply the length of the room by its width and divide by seven to get maximum capacity, including aisle space.

Classroom style

This is the most desirable set-up for meetings where participants will be required to sit for long periods and to take notes. Tables and chairs are arranged in rows facing a speaker's table or podium. It is most comfortable to have a center aisle and not more than three people per six-foot table. If you have the space, two people per table is luxurious. The drawback to this set-up is that it requires a large room and uses a lot of space, and occasionally it involves an additional charge. To find seating capacity for classroom set-ups, multiply the length of the room by its width and divide by 17. This will give you maximum capacity if you use meeting tables that are 18 inches wide and six or eight feet long. If the tables are 30 inches wide, divide by 23.

Board or conference style

Tables are set up to form a solid rectangle with chairs around the perimeter. Sometimes this shape will be rounded off on each end with half-moon-shaped tables. The number of people who can be accommodated by this set-up varies greatly with the style of chairs you are using. As you'll probably use this set-up to accommodate a small group of important people who need to be able to see, hear, and talk to one another, pay close attention to comfort. Chairs should be spaced so that participants can turn and get in and out of their seats without bumping the person next to them.

"T," "E," and "U" shapes

Common for groups of less than 40, these configurations are all based on an arrangement of six- or eight-foot tables with chairs placed around the outside edges. "T" and "U" shapes are good for meetings where people need to interact with a discussion leader or to see a demonstration. The "E" shape is sometimes used for meals, but it wastes a lot of space, and

the people seated on the back of the "E" are forced to stare at the sides of the heads of the people on the inside of the "E." None of these shapes is suitable for audio-visual presentations.

Moving reception

This is sometimes called a "stand-up" reception because guests are not seated. People mingle as they serve themselves food from a buffet or several food stations and get beverages from a bar. The number of people who can be accommodated by this arrangement is largely dictated by the fire capacity set by local ordinances. Be careful, however, not to stuff the room. Not only are guests uncomfortable having to squeeze by one another, but an overly full room makes it difficult for the hosts to greet guests and for people to reach food and beverage areas. You can figure capacity for a moving reception by multiplying the length of the room by its width and dividing by seven.

When you are planning food stations, bars, and displays, keep tables away from the main doors and be careful not to block fire exits. Distribute foods to different stations for interest and variety. One table could hold cheese and fruit, one hot hors d'oeuvres, one sweets. When expecting a large crowd, have several bars and make a separate serving station for people who do not want mixed drinks. A punch table or soda bar cuts down on the traffic jam and eliminates frustration for people who want non-alcoholic beverages.

Banquet style

For meal service for a large group of people, this set-up uses 66-inch round tables, which comfortably seat eight or 10 people. Multiply the length of the room by its width and divide by 10 to determine the maximum number of guests. This allows for a four-and-one-half-foot aisle between tables. If you are planning to have a head table, eliminate one entire row of tables. Before deciding to seat 10 people at each table, carefully consider your function. If there are many courses, wine and champagne glasses at each place, a large centerpiece, and several sauces or condiments, it is preferable to seat only eight people per table to avoid crowding plates and glasses. If guests will be wearing formal attire, seating eight people at each table is a much more gracious arrangement.

One problem with the round-table set-up is that at least two guests per table will have to turn completely around to see the dais. If table and room space permit, you can set each table for eight. Two places (without chairs or silver) toward the speaker are left open. A low centerpiece or other decoration as well as rolls and condiments can be arranged attractively in this space. While this set-up somewhat reduces the conversation options and increases the "passing" responsibilities of the guests nearest the open space, it may be the best arrangement if the after-meal program is lengthy or includes audio-visuals.

The dance floor

The arrangement of the dance floor varies greatly with the room, the program, and how many of the guests actually will dance. For a dinner dance, avoid arranging a large dance floor in the center of a ballroom with tables at each end; when guests are seated for dinner, the large

empty space in the room's center makes it seem as though two separate functions are in progress with the dance floor in between.

Setting up the set-ups

If you are conducting a conference or seminar, you probably will be using several rooms for different sessions over the course of the day. As you plan your set-ups, try to restrict yourself to one basic arrangement for each room and do not attempt to reset rooms between sessions. Putting up and taking down tables, chairs, and other equipment takes considerable time and often makes a good deal of noise that can disrupt sessions in other rooms. Here are some more tips:

- Make sure all audio-visual equipment needed in each room is set up and tested *before* the first session. If possible, fold up the screen and put it in a corner for those sessions where it won't be needed.
- Make sure that water pitchers are refilled and dirty glasses picked up between sessions.
- If your program includes an opening general session and a luncheon a few hours later, consider using the same room for both. The round-table banquet set-up gives your guests a chance to put down their coffee cups, get papers organized, and visit with other participants. And servers should have enough time after the opening session to redrape and set the tables.

Set-up checklist

You can use this list to help you remember the myriad details to attend to in arranging set-ups.

- Check for wobbly table legs and be sure that folding legs are locked into position.
- Chairs must be clean, with legs that sit evenly on the floor.
- Table skirting should be firmly attached so that it is not inadvertently pulled down when guests are seated.
- Check for obstructed views.
- The sound system must allow everyone to hear, but not blast them out—no one should be seated right in front of a large speaker.
- Look for torn or stained linen and be certain that replacements are available.
- Make sure all place settings include the full complement of glasses and silverware.
- Check placecards against your seating chart.
- Check that each table has favors, programs, and menu cards.

The dais

The dais, sometimes referred to as the head table, is a raised platform at one end of the room for honored guests, VIPs, speakers, and those instrumental to the success of a function. Although I prefer to eliminate the dais whenever possible (more about this in Chapter 5), if you do use one, you must check it carefully for appearance and safety. Pay special attention to these points:

- The dais table should be covered with a floor-length skirt.
- The riser should be wide enough for participants to push their chairs back and stand without fear of toppling off.

- Steps leading to the dais should be sturdy and not too steep and have a railing if possible.
- Floral arrangements or candles should not block the faces of the dais guests. Check this by sitting at one of the banquet tables on the main floor and looking up.
- Cords for microphones and other audio-visual equipment should be taped to the floor.
- Turn on and pretest all electrical equipment, including the podium light and microphone.
- If any speakers want to have notes at the podium, put each speaker's notes in a file folder with his or her name marked in large letters on the outside. Stack the folders in order from first speaker to last.
- Have a glass for each speaker and a small pitcher of water in an inconspicuous place near the podium.

Checkrooms and restrooms

Whenever you are entertaining guests, you should provide a secure place to store their coats, umbrellas, and other personal items. An attended checkroom is essential for formal occasions where some guests may have fur coats. If you use a checkroom that is open to other guests at the facility, make sure the facility manager schedules sufficient checkroom staff to meet your needs. You can arrange to have the costs of your guests' coat checks added to your master account. If you do, display a "No Tipping" sign. Make sure you include this service in your initial budget. For a large group or an all-day event, a checkroom can become expensive.

If there is no checkroom in the facility, you can create one in a storage room or a large area under a stairwell or some other convenient place. You can rent portable coat racks or borrow them from another facility on campus, and you can make numbered claim tickets. Checkrooms do not have to be in sight of guests. A team of students can take coats as guests arrive, hang them in out-of-the-way closets, and retrieve them as guests leave. Use a simple numbering system for claim checks, and assign someone to stay with the coats at all times.

Immaculately clean, completely stocked restrooms are an important behind-the-scenes element. Check all restrooms just before guests arrive and periodically during the event. Make sure housekeeping staff are available to clean and restock quickly.

If the facility has restroom attendants, arrange to have their gratuities added to your bill and see that "No Tipping" signs are clearly displayed in the restrooms.

When you are hosting an elegant affair at a facility with Spartan amenities, place tissues, fresh flowers, and some pretty soap in the restrooms.

Decorations

The first floor of the Mileti Alumni Center on the Bowling Green State University campus is a giant multi-purpose room, decorated in neutral colors with folding partitions and movable furniture. In any given week, the room can be transformed to accommodate a classroom-style lecture, a telefund, a formal dinner, or anything in between. Using little more than the equipment always available in the facility, event planners give the room personality through the decorations they choose.

For one affair, they created a look of romance by decorating table tops with beds of mosses, stones, twigs, leaves, and small stuffed birds and animals borrowed from an area taxidermist. On another evening, the room snapped with military precision; it was decorated in crisp red, white, and blue decorations for a dinner that preceded a skating performance by Olympic

Gold Medalist Scott Hamilton.

Even when the budget is small, decorations can look like a million. All you need is a little resourcefulness and a lot of imagination. Whatever your theme, set a limit on the decorating budget and stick to it. Establish the focal point and build from there. Will there be tabletop flowers? A painted backdrop? An outdoor tent?

The night of the Scott Hamilton Olympic dinner, the decorating theme was carried out by choosing red, white, and blue napkins and table linens—items that were already part of the evening's expenses. The bulk of the decorating money went to a local chocolate company that made authentic-sized "gold medals" wrapped in gold foil with a ribbon attached. These novel table favors became the center of attention, yet they cost under $2 each and were less expensive than the floral arrangements we would have needed without them.

Make use of the resources available on your campus. For example, enlist art students to create and implement unusual decorations. Check with the prop shop of the theater department for items you can borrow or rent at a low price. Ask the university gardeners to grow the plants and flowers you will need throughout the year. Order extra plants to mass around dark corners of rooms, to line the sidewalks, or to hide unsightly outlets, cords, and equipment. After the event, return the plants to the greenhouse so you can use them again later.

Stretch your decorating budget by recruiting volunteers to help make favors, tie ribbons on napkins, or attach tenting to the ceiling of a room, rather than paying a florist, caterer, or professional designer to do these things for you.

Here are additional decorating tips:

- Plan decorations early and work in advance to avoid a last-minute panic.
- Enlist a volunteer who has a vendor's license to purchase flowers wholesale. Recruit someone from the art department or another volunteer to arrange them for you.
- Build an inventory of decorating "staples" to avoid repeatedly renting them. Buy simple candle holders, a supply of baskets that can be used for centerpieces with pots of flowers, and plain vases and floral arrangement bases. Save ribbons from previous events and iron them before reuse.
- Invest in a quantity of seasonal dried arrangements that can be used repeatedly. An autumn arrangement can work from the beginning of school until the holidays. Share the costs with another office, such as the president's office. After one season, take the arrangements apart and salvage as many pieces as possible, but don't save the arrangements from year to year—they get too bedraggled.
- Plan to use volunteer talent. Keep a list of people who like to sew, make crafts, paint, do calligraphy and flower arranging.
- Pick up ideas at local crafts fairs. Part-time or home-based craftspeople often can create customized items at a considerable savings over commercial shops.

Equipment sources

Almost any decorating or party accessory can be rented, from pinatas to snow-cone machines. Explore the possibilities. For items in limited supply or great demand (such as tents for spring weekends), reserve well in advance. Make sure you know the payment policy of the rental firm—many require a check at the time of delivery, even for institutional customers. Inspect the equipment carefully to make sure that everything is in good condition and that you got the right number.

A school, college, or university often has a broad array of equipment available within the

institution. For example, many institutions have silver services stashed in a trophy case or locked in a closet in the president's office. As you uncover these treasures, keep a list on file, including contacts and procedures for using the equipment.

If you have your own facility where most of your organization's special events take place, it makes sense, in the long run, to purchase frequently rented equipment such as:

- china, silverware, and serving pieces;
- coffee urns;
- sugars and creamers;
- salt and pepper shakers;
- chafing dishes;
- pitchers for coffee and water;
- water goblets and a selection of wine glasses for white wine, red wine, and champagne;
- round tables for eight to 10 people;
- stacking chairs, upholstered in a neutral color and suitable for dining and conferences.

Security

Security isn't just guarding coats in the checkroom and preventing outsiders from crashing your party. If you are planning a large function or an outdoor event, you will need to provide security for crowd and traffic control as well as to ensure the safety of any celebrities who may be participating.

Begin security planning early in the development of your event. As soon as the date is selected and the type of event is determined, meet with the campus security officer or the security people at an off-campus facility. If necessary, they will coordinate arrangements with local police.

Security officers need to know how many people are expected, the nature of the event, and the schedule of activities. They should be informed of the presence of celebrities or others who may require escorts. Police officers should handle parking, direct traffic, and control access to facilities.

When a gathering ends late at night, arrange to have patrols in parking lots, garages, and along routes where guests will be walking.

On some campuses, the expense of security for special events is covered by the university. For others, the event sponsor is billed. Find out what security is provided on your campus and who pays for it. Your event may require additional security arrangements, and you may have to pay for them or arrange them yourself. With a very large group—and especially an outdoor event—you may need to have an ambulance and first-aid station on site. Make sure you learn these facts early so that you can plan and budget accordingly.

Parking and transportation

Parking should be easily accessible, especially if an event is held at night. If the parking area or garage is too far away, arrange a valet service with students as drivers. The members of Greek organizations or campus service clubs are usually happy to take on such a project in exchange for a contribution.

If you plan to use students or hire people as valets, check first with your institution's risk

management officer to determine any additional insurance needs. Meet with the valets before the event to discuss where and how to park the cars, what to wear, and when to report for work. Be sure to emphasize the need for respect for the automobiles they will be driving.

Establish a policy on tipping and be certain that the valets know and obey that policy.

With parking at a premium on many campuses, sometimes the only practical solution is a satellite arrangement where guests are shuttled from the parking lot by bus or van. If you establish a shuttle service, be sure to use enough vehicles to minimize waiting, especially at peak times. All vans and shuttles should be free of charge and clearly marked. Provide each guest with information on routes, times, and stops.

Many universities have a transportation department that can assist with arrangements or that may be available for hire. Although it may be the most expensive option, try to hire regular university drivers because they are already covered by the institution's insurance. If you must hire outside help, check state and local laws regulating who is eligible to drive vehicles for this purpose. In most states, anyone who drives a bus or van to transport a group of people must be at least 21 years old and have a chauffeur's license. Check your insurance policy to make sure you are covered.

Meet with shuttle drivers beforehand to review work schedules and routes and to discuss the event in detail. Leave an activities schedule on each bus. Because many visitors will ask general questions of drivers, be certain the drivers are knowledgeable about the institution and are willing to make a friendly impression. Review where to pick up passengers and how long to wait. On a busy dedication day, one of my drivers left guests stranded because I had neglected to tell him to keep driving a circular route—he drove around once and went home!

Smoking or nonsmoking?

Policies on smoking are in flux. Federal, state, and municipal no-smoking laws are changing. Obviously, you have to comply with the requirements of the location of the function. Whether you choose to further limit smoking depends on your institution's policies, the composition of the audience, the nature of the function, and the facilities available. The majority of your group are likely to be nonsmokers, and a few may be very sensitive to tobacco smoke, but probably a sizable minority will be smokers. The objective is to make everyone as comfortable as possible. Here are a few commonly used guidelines:

- In a conference or seminar situation, smoking is usually prohibited in the meeting rooms but permitted in the hallways. Most hotels provide ashtrays in the corridors and lobbies outside meeting rooms. However, when a small group of people is expected to sit in a room and work together all day, sometimes smoking is permitted to avoid losing the smokers to cigarette breaks. Usually the group will split itself into smoking and nonsmoking contingents. The key in this situation is to be sure the room has excellent ventilation. You can also cut down on smoke in the meeting room by serving coffee breaks in the hall, rather than in the back of the room.
- At cocktail parties smoking is usually accepted. Provide ashtrays on every available surface throughout the room to avoid the unpleasant sight of cigarette butts in drink glasses and cocktail plates. If smoking is not permitted in the room where the party is held, expect smokers to migrate to the hallway or a location where they can smoke.
- How to handle smoking at a banquet poses a dilemma for an events planner. After a drink, a meal, and coffee, almost every smoker lights up. If you choose to prohibit smoking in the banquet room, the smokers very likely will drift out for a cigarette just as your program be-

gins. And you will also have to put "No Smoking" signs on every table. The absence of ashtrays will not function as a deterrent; guests will use their bread-and-butter plates or whatever else comes to hand. You may find that the only effective way to deal with smoking at a banquet is to handle it the way restaurants do, with smoking and nonsmoking sections.

When you decide to ban smoking from a particular area, rather than post stark "No Smoking" signs, use signs that harmonize with your decor and offer the smokers some hope, such as "Smoking is permitted in the lobby and on the veranda."

Chapter 4

Food for Thought: Eat, Drink, and Be Merry

A caterer can make or break a special event. Although people don't attend special events in hopes of gastronomic ecstasy, good food and drink, imaginatively presented, will go far toward creating the right ambiance.

Food and beverages will likely be the largest single expense for your event. Plan to devote special time and attention to working with food service personnel to develop the menu you want at a price you can afford.

When you first meet with your caterer or facility event planner, be honest about your expectations and your budget. Don't be embarrassed to admit you don't understand catering terms and hotel jargon. Caterers and conference planners are there to help you get the most for your dollars. They want you to succeed.

Often, especially at larger facilities, there is a great deal of flexibility, not only in the variety of food and beverages that can be offered, but in creative resources for giving your event that special pizzazz. Ask about events held by other groups. Find out the chef's specialty or meet with him or her to develop a special theme menu or unusual presentation. Or you can personalize a catered event by asking the chef to prepare a special recipe of your own or of your committee members. There is no extra charge for these services and chances are the chef will be delighted.

Throughout my career as a special-events planner, I have never forgotten a remark made to me by a prominent board member who traveled extensively. As we finished a rather routine dinner which ended with our "famous" coconut cream pie, she turned to me and said, "I can always tell when I'm in Bowling Green, because we always have Bowling Green food." In other words, she was bored, and our food service obviously needed a quick injection of creativity.

At your initial meeting with a caterer, determine that the date is open on his or her calendar and then discuss the type of event you have in mind, the number of guests anticipated, the place you want to hold the event, any ideas on theme or special needs, the time of day, special colors for the linen to complement your decorations, and your approximate budget for catering services. Ask for an estimate before committing yourself. Seek the caterer's creative input on food and its presentation, beverages, and decorations to develop your theme.

Because much of entertaining revolves around the serving of food, the quality, quantity, and presentation of that food are crucial. It is easy to fall into the trap of always using the same

caterer and rerunning the same menus. This can be risky business, particularly when the same people are entertained again and again over the years. The Bowling Green board member had probably had coconut cream pie at every university event for 25 years!

Catering firms have personalities and special talents. One may be known for fantastic hors d'oeuvre buffets, another may be expert at fabulous desserts, yet another may excel at outdoor events such as barbecues or clambakes. Get to know the caterers in your area and trust word-of-mouth references. Cultivate relationships with a number of caterers so you won't be stuck if your "favorite" is too busy to handle an event for you.

Try out a new catering firm on a smaller, less important event. Evaluate the quality of food, service, attitude and appearance of personnel, and the condition of the facility after they leave. Ask to look in on another function the catering firm is handling that is similar to the one you are planning.

The menu

When selecting a menu, think of the people you have invited and the hour of day. Will they have eaten dinner already or will they be famished? Are there people in the group with religious or other dietary restrictions? Menus for luncheon should be lighter than menus for dinner, and menus for a predominantly male group should be more substantial than menus for a group of women.

Don't overfeed people. Portions that are too large look wasteful, even unappetizing. If you offer a heavy luncheon in the middle of an all-day meeting, chances are that your participants will be nodding in their seats by 2 p.m. By the same token, don't try to save money by sliding through the dinner hour with nothing more than hors d'oeuvres.

Offer the freshest seasonal foods your budget will allow, but don't make your selections so unusual that no one will eat them. If you're not sure what is in season, ask your caterer. Seafoods and fruits are examples of foods that can fluctuate wildly in price according to season.

Americans today are very nutrition- and health-conscious. A high-fat, high-calorie menu will not be welcomed by many people.

If you are planning meals for a meeting lasting several days, look at the menus you have selected as a total package. Keep your selections on the light side overall. People who will be sitting all day in meetings can become lethargic after they have spent several days consuming unfamiliar food and drink.

Never douse desserts or any other part of the meal with liqueurs or other alcoholic beverages. If you do serve liqueurs or alcohol-based sauces, present them in separate pitchers, clearly and attractively labeled.

If possible, have the caterer serve a test meal to you and several members of your committee. Although you may have to pay for this extra service, it is a wise investment. At such a test meal, for example, one meeting planner discovered that the chef flavored the rice medley with pork bits. This would have been no problem for some events, but serving that dish to that particular group of guests would have been a major faux pas.

At the test meal, work with the caterer to fine-tune the presentation of the food on the plates, the garnishes, the amount of dressing on the salads, the size of the portions. Be honest, and express and discuss all your concerns.

Contracts: Get it in writing

Caterers can do as much, or as little, as you desire. Good caterers are prepared to provide everything from food to flowers and entertainment, extra equipment, service personnel, liquor, bartenders, people to park cars, and a clean-up crew.

Before your event you should receive an arrangements order detailing which of the caterer's services you will be using. This is a contract, so read it carefully before signing and returning it with any additions or changes. The arrangements order will spell out the number of guests anticipated, the menu, the linen selected, and any optional services to be provided by the caterer, the time to serve each item, and how much each item will cost.

The arrangements order will state a "guarantee"—that is, the number of people who will attend (or are expected to attend) the function. The guarantee is used to determine how many meals to fix, how many places to set, how many staff are required, and how much it all will cost you. Near the guarantee number, or sometimes in the fine print, most contracts state that the caterer requires a 24-, 48-, or 72-hour guarantee. This refers to the time before the event when you must tell the caterer the final number of people who will attend. A 48-hour guarantee means you must call no later than two days before the start of the event. After the deadline but with time to spare before the event, you may be able to increase your order, but do not expect to be allowed to decrease it. The food may be ordered or prepared in advance and staff hired.

During preliminary planning discussions, you will estimate the number of people who will attend, and this is the number that will appear on your arrangements order. By the event date, this number could have gone up or down dramatically. Keep the caterer up-to-date on any significant change in your projected attendance. A menu selected for 80 may not work for a crowd of 200.

How much food? How much money?

You will be billed for the number of guests you guarantee. If you originally estimated 150 people and only 75 made reservations but you never called with a corrected guarantee, you will be billed for the original 150. It is standard for caterers to build a plus or minus 10 percent into this guarantee number. If you guarantee 100 people, but 110 show up, the caterer should have 10 extra meals ready. You will be billed for the full 110. If your count exceeds the percent of overage agreed upon, the caterer is not responsible for supplying food to feed the unexpected guests, although most caterers will try to accommodate.

Food prices are typically quoted "plus plus"—meaning plus gratuity and plus sales tax, and generally the tax applies to both the food and the gratuity. Thus, for a luncheon priced at $12 per person, add the gratuity, usually 16 percent, to make $13.92. Then calculate the sales tax, 5 percent for example, on top of that figure to give the meal a cost of $14.62 per person.

Food costs may be quoted either per person (usually for a served menu) or per item (for a buffet). Per-item prices generally apply to expensive, unusual food, such as fancy hors d'oeuvres, and can push costs up quickly. Don't make the mistake of thinking that a buffet will be cheaper than a sit-down meal. Buffet prices, especially for small groups, can be higher and are usually figured on one-and-one-half portions per person rather than the one serving per person you would pay if an item were served. Buffets for groups of less than 25 frequently carry a surcharge. Be careful when you are agreeing to the number of pieces per person on an hors d'oeuvres buffet because portions can be skimpy and you're likely to run out of food. Do plan to offer a mixture of hot and cold foods.

Emergency rations

Find out in advance what the caterer can supply quickly in the event that the food you ordered gets eaten too quickly and what it will cost. "Emergency" supplies of food can cost more than the original items. Also, remember that a hotel or conference facility with a kitchen provides much more flexibility in the event that you need extra food quickly. At a facility far from the caterer's kitchen, you may be out of luck!

Once we hosted a large group of alumni after a professional football game on a frigid November afternoon. An ample post-game hors d'oeuvre buffet had been planned, but people were so cold when they arrived that the first wave of guests ate all the hot food. Later-arriving guests were rightfully disgruntled, and the caterer could not provide back-up food.

Knowing when to worry about back-up food is an instinct that seems to develop with experience, and if you have done your planning carefully, this nightmare may never occur. Be prepared, however, and give one person the authority to order more food during the course of an event; identify that person to the catering manager. Instruct the catering staff not to bring out additional food or drink without the OK from that person.

Check and double-check the time of the event and the order of the program. Discuss the flow of the program with the catering staff and orchestrate serving to be on time.

The ins and outs

Find out when the caterers will need access to the facility and notify the facility manager of your needs. Be aware that you will be billed rental for this extra time. Budget for enough time for clean-up and removal of property and decorations following an event.

Ask what happens to leftovers. You will be paying for enough food for the number of people you guaranteed, so leftovers are your property. You can take leftovers with you after signing a release that absolves the caterer of responsibility if the food spoils because it sat in your car overnight. Because students are usually involved in special events at a university, you might offer them the leftovers. Or you can donate the leftovers to a church or community soup kitchen or shelter for the homeless.

Caterers may not volunteer to leave leftovers. In fact, often the only representatives of a catering company on site after the event are the clean-up crew, and they may not know their employer's policy on such matters. Get an agreement before the event, and be sure to clarify policy on unopened items, such as beverages, that may be returnable.

One Saturday afternoon, as a guest at a pre-football luncheon, I was surprised to see the vegetable and dip tray left over from an event I had hosted the previous evening. The tray had not been touched the night before, and because I had not requested that it be left, the caterers had returned it to the restaurant, which had recycled the tray *and* its contents.

The service staff: From black uniforms to blue jeans

Discuss what uniforms the catering staff will wear. If the uniform style is inappropriate for your event, or if the color will clash with your decorations, request another uniform. Most

large caterers have several standard uniforms that typically include a black and white, a pearl gray, or an all-black. If choices are not available, request a simple black pants or skirt and a long-sleeved white shirt. If you are planning a theme party, the service staff may be able to dress in costume. Large caterers and hotels often have several standard theme parties and will probably have the appropriate uniforms. If you request special uniforms, be sure to ask if you will be billed extra.

If you have a generous budget, you may want to rent costumes for the service staff. A good resource for inexpensive costumes on a college or university campus is the theater costume shop. Some themes could be carried out with clothes most people already own. For example, if your event has a western theme, request that servers wear blue jeans or jean skirts with western shirts. You can inexpensively enhance the outfits with bandanas and toy cowboy hats from the local discount store. Make string ties from a bolt of ribbon.

Don't forget the dishes

If the facility you're using is equipped with china, glasses, silverware, and serving utensils, ask the caterer for consideration on the bill. Not having to transport such items saves the caterer substantial time and labor.

Inspect the dishes, silverware, glasses, and serving utensils the caterer will use for your event. If they are shopworn, you may want to rent more presentable items from an independent supplier or have the caterer do this for you.

Tired serving dishes can be camouflaged by placing them in baskets or by arranging greens or cut flowers around their bases. Or you may be able to eliminate them entirely by using hollowed-out breads or vegetables like purple cabbage to hold dips. Fruits, cheese, and hors d'oeuvres can be attractively displayed by piling them up in an arrangement like that in a still-life painting.

When the party's over...

Clarify clean-up responsibilities. If you have rented a facility and engaged a caterer, you are obligated by the terms of your rental agreement. If the facility is not in satisfactory condition when you leave, you will probably be charged for any extra clean-up required. Furniture that was moved must be replaced. Be certain your caterer understands what is expected and readily fulfills that obligation.

At the time a contract is signed and an event "booked," many caterers require a deposit of between 20 and 50 percent of the total bill. Ask when the final payment is due. Some caterers will bill the client for the balance after an event, others want payment in full that day.

Be certain you understand the cancellation clause of your catering contract. It will spell out exactly when you can cancel with no penalty or with a percentage penalty and when you must pay for the entire amount. If you are planning a costly outdoor event and have no back-up facility, you may want to purchase cancellation insurance to protect you from financial disaster in case you are rained out.

Libations

Cocktail parties and alcoholic beverages are fairly new to the special-events scene on many campuses, where no-drinking policies were once in force. Along with this more liberal attitude toward alcohol, planners must also be sensitive to a growing public awareness of the problems associated with alcohol consumption such as the hazards of drinking and driving.

Before planning an event that includes alcoholic beverages, make sure you clearly understand the policy of your administration and the laws of your state and municipality. In some states, it is illegal to consume alcohol on state or public property, to sell drinks or tickets for drinks without a liquor license, or to use state money to purchase alcoholic beverages. Federal programs may have similar restrictions, so that the budget for a seminar sponsored with federal funds could not include cocktails. In times of tight budgets, a fast way to incur the ire of faculty and donors is to spend donated funds on the purchase of alcoholic beverages.

The drinking age in most states is now 21. Therefore, avoid including undergraduates at an event where alcohol is served unless you are prepared to check identification and police the crowd. Or consider not serving alcohol at all if you hope to attract a younger crowd.

Plan your function to reduce the chances of guests drinking too much. Limit the length of cocktail parties and before-dinner receptions. Serve hearty hors d'oeuvres—carbohydrates, fats, and proteins. Fruits and vegetables are not enough. Salty snack foods such as nuts and chips will encourage your guests to drink more.

Coffee is a pleasant way to end an evening, but it does nothing to counter the effects of alcohol. Only time can do that. The body requires about one hour to burn off a typical drink—12 ounces of beer, five ounces of wine, or an ounce and a half of liquor.

Finally, be prepared to deal with an intoxicated guest. Your bartenders should know how to cut someone off diplomatically. When and how to intervene is a difficult judgment call, but you owe all of your guests as pleasant an evening as possible.

As your guests prepare to leave, try to have a cab or a driver available so that you can quickly and discreetly provide a ride to any guest who should not be driving.

These suggestions are not just good manners; they are necessary to protect you from lawsuits. Many state and local laws hold the host responsible for the actions of an intoxicated guest. Make sure you know your legal obligations as a host, and act accordingly.

Purchasing liquor

If you are holding your event in a conference facility or a location other than a hotel or restaurant, you may want to supply your own wine and liquor *if* you are not setting up a cash bar (see the section on insurance and liability in Chapter 1). Caterers can supply wine and liquor, but they take a substantial markup. If you decide to purchase your own, you can usually arrange with the caterer to provide a bartender and the set-ups (drink bases). Typically, you will be charged a bartender fee and a set-up fee on a per-drink basis. Your wine, poured by catering personnel at the dinner table, will be assessed a per-person corkage or pouring fee. While supplying your own liquors can be a real money-saver, especially if you are entertaining at your own facility, you may find it is not really worth the time it takes to purchase and transport the liquor yourself.

When the caterer supplies the liquor, agree on what brands will be served. Unless you are having a very exclusive party or the honored guest has a known preference, avoid the more expensive "call brands." Make moderately priced selections, but avoid "Brand X" liquors be-

cause regular drinkers can tell the difference.

Never ask a hotel or restaurant if you can supply your own liquor. These businesses depend on food and beverage service, especially cocktails, for their profit margin.

Pricing policies vary—per drink, per bottle, or per person. No matter how it is calculated, expect to pay much more than if you bought the same bottle in the liquor store.

Make sure that bartenders pour drinks with a standard ounce-and-a-half jigger. If you are paying by the bottle, overpouring can drastically increase your costs. Ask that wines not be opened in large quantities or, when the event is over, you'll be stuck with opened bottles that were never poured.

Make sure you know beforehand how leftover liquor will be handled. Empty bottles should be saved to verify the count. If you are paying by the bottle, opened bottles should be given to you, but you should not be charged for unopened ones. Of course, if you have supplied the liquor, it all belongs to you, and some liquor stores will allow you to return any bottles that weren't opened.

Serving liquor

Cocktails can be served either from an open bar or a cash bar. At an open bar, guests do not pay for their drinks and the host picks up the tab for the entire party. At a cash bar, guests pay for their drinks as they order, either in cash or by purchasing tickets to exchange for drinks. A compromise between the two is to provide each guest with one complimentary ticket and sell additional tickets to those who want more.

Whichever option you choose, engage a professional bartender to pour the drinks. If students are employed by your catering service, be certain they are old enough to serve alcohol legally; this includes passing champagne on a tray and pouring wine.

Cocktail parties with an open bar can be very expensive. Control costs, and consumption, by setting a time for the bar to close and sticking to it. A pre-dinner cocktail party should last no longer than an hour.

Other cost-saving alternatives are:

- a wine bar offering a few selections of red and white wines;
- a wine punch;
- theme drinks, such as hot toddies, mint juleps, or bloody marys.

Always make sure that interesting and attractive non-alcoholic drinks are prominently available. A fancy fruit punch or fragrant spiced cider can be made as appealing as a mixed drink—and save you a great deal of money.

Whatever the function, consumption of alcoholic beverages should not play such a prominent role that nondrinkers are made to feel embarrassed or left out. This applies not only to cocktail parties but to dinners that include wine service and champagne toasts. You must offer an alternative to alcohol.

Expect the unexpected

Here are a few tips gleaned from years of frontline experience. They should help you avoid or smooth over catering problems:

- Always order a vegetarian plate as a back-up in case one of the guests does not eat meat. When you are serving a seafood entree, order a meat entree in case someone is allergic to

seafood. One such plate should be sufficient for a group of fewer than 50; if your group is larger, you may want to play it safe by ordering two or three. If these dinners aren't served, offer them to student workers. Consider including on meeting registration forms a place for the registrant to note any dietary restrictions.

- When hosting a VIP, call his or her secretary during the planning phase of your special event to find out favorite dishes and drinks as well as those to avoid.
- Keep an "emergency kit" handy during the event with items such as a notepad; a corkscrew; a can opener; cash and a credit card; a master key and the keys to all cupboards, doors, and drawers; emergency phone numbers for the police and fire departments, the caterer, entertainers, bartenders, student workers, florist, facility maintenance, and audio-visual repair service; extra placecards and the pen used to letter those already prepared; needle and thread; safety and straight pins; transparent and masking tape; a small hammer and screwdriver; first-aid supplies and aspirin; master copies of the order of events and guest list; projector bulbs and extension cords; and business cards.
- Always inspect the linen placed on the table for conspicuous patches and stains. Ask to have any that appear unacceptable replaced.
- Review the order of service with the catering manager before the function. Alert caterers to pauses for toasting. Talk about the pace of service—whether dessert plates should be taken up before the program begins, how long to serve coffee.
- Discuss the details of the table setting: sugar in packets or sugar bowls, butter pats on individual plates or a serving plate, appetizers and rolls preset or served.
- Request that cups and glasses be placed on the tables right side up instead of upside down as required in restaurants in many states.
- During a large event spread throughout a large facility, or when split-second cues are required, provide walkie-talkies to staff. Most hotel conference staff, engineers, and audio-visual technicians carry beepers. You can rent beepers for your key staff as well.

Over budget? Here's where to cut

So you've planned the perfect party only to find that your tastes surpass your budget. How can you cut expenses without diminishing the quality of your event?

First, review the menu. Perhaps you can eliminate a course or switch to a less costly entree. Sometimes substituting different cuts of meat or reducing the serving size will do the trick. Consider eliminating the appetizer or expensive extras like shrimp, fancy cheeses, or exotic garnishes. Fortunately for the budget-wise, the present popularity of pasta dishes offers a reasonable, fashionable alternative to expensive meat or seafood.

If your budget is really out of line, consider reformatting your event from an entire meal to something less extravagant such as a dessert or a brunch.

A place to save big money is on the bar and wine service. Explore creative alternatives to an open bar. Unless toasts are planned, eliminate champagne. Consider whether wine is really needed with dinner.

If entertainment is causing your budget to go into the red, eliminate it, limit the length of the performance, or search your campus for a quality student group. But never save money by hiring inferior entertainment.

Decorations and flowers can also cause budget problems. Reduce the number and variety of flowers in the planned arrangement. Stay away from expensive flowers like roses and exotic tropicals that can cost several dollars per stem. Or do it yourself by ordering fresh flowers

and greens and arranging them in inexpensive vases or baskets.

Eliminate such frills as custom-made favors; printed materials such as programs, menu cards, and souvenir books; candles that require the purchase of holders; and special chairs or tables ordered just for one evening. Pare the guest list of university representatives who are "complimentary" guests, but not really essential to the success of the event.

Never trim the budget by reducing the quality of the food or drink at your event or the number of service personnel.

Chapter 5

Welcome

How you meet and greet your guests will set the tone for the entire event. Make sure you combine warmth with efficiency. Be consistent with the visual presentation of your event. Guide arriving guests with welcome signs bearing the same name, colors, and graphic elements that you used in the invitations, announcements, and publicity. Make sure that your event is prominently displayed on the lobby function board of the hotel, convention center, club, or hall that you use.

Registration

Position the registration desk prominently, but allow enough room so that guests waiting to register don't block the entrance to the room. Divide your group into logical categories, such as alphabetically or by class year, and mark the separate stations clearly, with overhead signs if possible. Have name tags and registration forms alphabetized, at the ready. Provide a table and chairs off to the side for guests who must fill in forms or name tags.

Take full advantage of your computer's ability to produce everything from last-minute attendance lists to beautifully readable name tags.

Make sure all the registration staff understand how records are to be maintained, who has paid and who has not, and how to handle problems, especially with regard to payment. If possible, have at least one "floater" at the registration table who deals with problems so that other guests are not delayed.

Most importantly, have a senior event coordinator present who has authority to resolve all questions on the spot. Don't make a guest wait while a staff member tries to track down a person with authority to make decisions. Waiting can create as much ill will as any negative decision.

Have a phone at the registration desk and make sure the facility's operator knows about your event and has your extension number. This is particularly important when you are using a large facility with many events taking place simultaneously.

The packet you give out at registration is an important public relations tool. Often your guests will have some extra time before the event starts and will thumb through your packet. Don't waste this opportunity. In addition to the program for your event, tickets, permits, campus map, and other pertinent documents, include information on your institution and, in particular, this event. You may also want to add entertainment and sports schedules, a restaurant guide, and a memento or keepsake, such as a notepad and pen and a sticker or decal, all carrying your institution's name and logo.

Always include emergency numbers for security, fire, and rescue. Provide information about hours and costs of services such as recreational facilities; if possible, make arrangements to allow your guests to use campus facilities free of charge.

Generally, you don't want guests to linger at the registration desk to inquire about campus tours or local restaurants. Instead, position a well-stocked welcome table near the registration desk but out of the traffic stream where visitors can stop to pick up additional brochures or ask questions. Staff the table with well-informed people who are genuinely interested in making the guests feel welcome.

Welcoming VIPs

In some cases, it is appropriate either to meet VIPs at the airport and escort them to campus or to arrange transportation for them. Be sure to communicate these arrangements clearly to avoid confusion. VIPs frequently enjoy having a student among the escort party, because it gives them the opportunity to gauge student opinion at the campus and it provides insight for talks or speeches. But choose the escort carefully. As your institution's representative, the escort has a unique opportunity, perhaps one of the few quiet moments during the event, in which to talk to the VIP. Don't waste that opportunity by selecting someone who will represent your institution poorly.

If accommodations are not close to the meeting facility, it may be both gracious and expedient to provide transportation and an escort to and from the meeting site.

The question of who is paying for which expenses should have been resolved, in writing, before the VIP's arrival. Make certain that appropriate arrangements have been made with the hotel. Double-check not only with the sales office, through which you may have booked the room, but also with the front desk, to see that the payment instructions actually appear on the reservation card. Also verify any other arrangements—such as car rental—made for the visitor.

It is a nice gesture to place a welcome gift in the rooms of speakers and VIP guests. A fruit or cheese basket, a bottle of wine, flowers, or a small item embossed with the university seal is appropriate.

Those VIPs who do not require an airport welcoming committee should not have to wait in line at the registration table with everyone else. Instead, invite them to a private reception where you can give them their name tags and packets.

Hosts and hostesses

University students make excellent ambassadors of goodwill at special events. Recruit a corps of students to serve as hosts and hostesses for your organization throughout the year or on a per-event basis.

Hosts and hostesses and other staff and volunteers should be fully briefed. Before each event, hold a meeting to be certain everyone is familiar with the agenda, the reason for sponsoring the event, the location of all facilities, and general campus facts such as where to grab a quick bite to eat, where to find university souvenirs, and the history and significance of campus landmarks.

Identify student hosts and hostesses with armbands, lapel badges, ribbons, pins, or matching jackets. Assign some to specific duties and station others in strategic places on campus to provide directions and answer questions.

Seating arrangements

When the special event is a formal dinner or luncheon, seating arrangements can be a prime concern. Seating can facilitate important business relationships, foster friendships between key people who otherwise might not meet, and grease the wheels for crucial private support. At the same time, sparks can fly and all guests be made uncomfortable if seating arrangements are not planned carefully.

Seating for a special event requires more than a knowledge of the rules of etiquette. You need to know who's who on the guest list. Are there mortal enemies among them? Are exspouses going to be attending with new romantic associates? Is there someone your president needs to spend time talking with?

If you are not familiar with seating protocol, consult a good etiquette book. If you find yourself organizing an affair for elected officials or members of the military or diplomatic corps, be aware that there are specific rules for who is seated next to whom. The *Amy Vanderbilt Complete Book of Etiquette* explains correct seating in detail.

Of course, assigned seating requires placecards. These can be handwritten by someone with beautiful handwriting, done in calligraphy, or typed in an attractive type font. Placecards should be positioned above the plate, propped against a glass, or left on top of the napkin. The printing on the placecards should be large enough and there should be enough light at the tables so that guests do not have to bend over to read the cards.

Staff members direct guests to their tables using an alphabetical list and a seating chart. Or you can give guests a card that has the name on the front and the table number on the back.

Another technique for less formal gatherings is to use colored ribbons. Each table is decorated with a different color ribbon, and when guests arrive, they are given the corresponding color of ribbon rather than a table card. Placecards on the tables indicate where each guest should sit.

Open seating

Open seating—guests can sit wherever they like—is used at less formal functions, or where an advance guest list is not available in time to make assignments. Try to keep all tables full to prevent gaps that make serving and conversation difficult. Having tables set for different numbers of people can help alleviate this. Mix seating for six, eight, and 10 people.

The dais and alternatives

The dais is one of the most frequently misused and misunderstood aspects of special-event banqueting. All too frequently, an odd collection of people get stuck on the dais. Letitia Baldrige offers the most comprehensive explanation of the difficulties of dais seating in her *Complete Guide to Executive Manners*. As she explains, the dais is reserved for honored guests only. With the exception of the spouse of the main speaker, spouses of the other dais guests are seated elsewhere. (*Letitia Baldrige's Complete Guide to Executive Manners* (New York: Rawson Associates, 1985),p. 319) Many event planners feel obligated to offer complimentary meals to dais guests, but Baldrige believes that it is perfectly acceptable to ask dais guests to pay for tickets, particularly at a fund raiser. Just be sure to make this clear in the invitation. Converting dais guests from complimentary to paying participants can really save your budget.

I advocate eliminating the dais whenever possible at university functions. Because university entertaining frequently endeavors to mix outsiders with students, faculty, and staff, it's much more productive to place honored guests throughout the room so that more people have the benefit of talking with them. Students in particular are thrilled to "rub elbows" with a successful politician, business person, or celebrity, and the honored guest is spared the discomfort of being displayed on a platform.

As an alternative to the dais, try this: Place the podium on a small, low, easily accessible stage or riser with an attractive floral arrangement, national and state flags, or your institution's seal or banner. The guests who would normally be seated on the dais should be placed at tables close to the podium. A university representative can serve as host at each table. When it is time for the program, each person simply walks to the podium, speaks, and then returns to his or her table. This arrangement is particularly appropriate for award banquets involving many presenters as well as many award-winners who must walk to the podium, receive the award, shake hands, be photographed, and return to their tables.

For those occasions when a dais is absolutely essential, follow the rules for proper seating according to each person's role in the program. If the podium is located in the center of the dais, the host is seated to the right of it. Next to the host is the guest of honor. The second most honored guest is seated immediately to the left of the podium. On that person's left hand, the second host for the event is stationed. Host number three is seated between the most honored guest and honored guest number three, and so on, alternating back and forth between the right and left sides until all the seats are filled. Try to have an even number of people on both sides of the podium and never have anyone sit behind the lectern. Always have placecards on the dais, even when you don't use them for the rest of the guests.

The arrival and seating of dais guests is important to the successful orchestration of your event. If you have chosen dais guests properly, they are very special people and deserve to be a focal point. They should be seated with ceremony. To accomplish this, assemble dais guests in a private room beforehand. This gives them time to chat with university officials, other VIPs, and each other, and enables you and the other hosts to welcome them individually. Brief them on the program schedule so they will be prepared when it is their turn to speak. Line up the participants in the proper order. When the rest of the guests are seated and quiet, either the maitre d' or a designated staff member should announce them as they enter.

It is particularly effective if the band strikes up a march, or does a drum roll, or plays your institution's alma mater if it isn't too slow and sweet. At this point, the audience should applaud as the honored guests file in, but you and your staff may need to start the applause.

When dais guests are seated and the room is quiet, the master of ceremonies takes over, first introducing himself or herself and then introducing each honored guest.

Chapter 6

Raise the Curtain, Light the Lights

The master of ceremonies establishes the tone and flow of a gathering, gives it credibility and makes the audience come together for a common cause. A dull emcee can undermine the most beautifully planned program. At most institutions, politics usually enter into the selection of an emcee, especially for prestigious events.

Before selecting an emcee, think carefully about the personality of the event and try to match it with the personality and talents of an individual on the committee, your own staff, or someone otherwise involved with the institution. Secure the person you want before someone less desirable is foisted on you. The emcee should be articulate, have a good speaking voice and a pleasant appearance, and be able to "think on his or her feet."

Meet with the emcee to review the order of events and to determine the cues for speakers, lighting changes, audio-visual presentations, music, and entertainment.

Provide the emcee with introductions that can either be read as written or reworded in his or her personal style. Discuss details such as dress and the need to keep the program running on time. Be sure the emcee has all the necessary permits for parking and admission.

Meet with the emcee immediately before the event to review plans or make changes.

Entertainment: Strike up the band

College and university campuses can provide great entertainment resources. Bright, talented students are usually available to provide everything from a variety show to piano or harp music during dinner. Using students showcases their talents and gives them the opportunity to perform in a "real life" scenario—and make a bit of extra money. Student talent gives the event planner a fresh, affordable source of entertainment.

Most music departments have a list of student and faculty performers who can add just the right touch to your event. But do audition the talent before booking, and get to know the people who book student talent on your campus in order to get their best advice and their cooperation.

If you decide to hire professional entertainers, you can follow up word-of-mouth recommendations, but audition the acts either by attending a performance elsewhere or by requesting a videotape. You will likely be working through an agent to arrange a booking. Always read contracts carefully, and get everything in writing. Professional entertainers and faculty

performers often earn union-scale wages and are therefore considerably more expensive than student talent.

Your entertainment should do more than just "entertain." It should create the atmosphere you want; it should help break the ice between strangers by giving your guests something to talk about. Think creatively and explore widely—wandering musicians, mimes, craft demonstrations, a dance exhibition, computer games, whatever is appropriate for your event and your budget.

Make sure you and the entertainers agree on all aspects of the performance. If a band will be performing, a staff member should be present for the pre-performance sound check. Unless the performance is a concert, many of your guests will want to talk as the band plays. Be sure the music isn't too loud. While it's important to respect the band—if you didn't want them to play, you wouldn't have hired them—you also don't want your guests to have to shout as they try to carry on a pleasant chat. Remember that those conversations are often a large part of the reason you are staging the event.

Audio-visuals: Don't just tell them—show them!

Quality audio-visuals can greatly enhance your program. Messages sent through visual images, like the ones people are accustomed to seeing on television, have instant credibility and can help plant your message in peoples' minds. People remember things they see far longer than things they hear.

Today's technology offers great versatility and makes special effects available to almost everyone. Dual screens, rear-screen projection, and fast-paced images fading in and out to a quality sound track are just a few of the options.

Special effects using sophisticated audio-visual techniques can add a terrific kick to your special-event program. One of the best uses of special effects I ever saw was at a black-tie gala to launch The Ohio State University's $350-million capital campaign. Late in the evening, after a lengthy program that included several speeches, the emcee introduced a video about life on campus. The room was dark, and the video rolled on, covering all phases of campus life and eventually turning to a football Saturday and the famed OSU band. Guests were jolted to their feet when the band marching on the screen became real, live band members marching into the ballroom! Their entry had been synchronized so that they appeared to march right out of the screen, playing the OSU fight song that had been in the video. Simultaneously, the house lights came up and the guests were on their feet clapping and singing. The room was instantly united and took on the feeling of a pep rally. As the fight song faded into the alma mater, some guests were moved to tears.

While I'm not suggesting that we all incorporate marching bands into our black-tie dinners, the point is this: The OSU staff knew the secret of motivating their audience and found a creative, professional way to get the job done and done well.

Rule number one when planning audio-visuals is do it right or not at all. Don't use an audio-visual as a gimmick but to fill a definite need and communicate specific information. Otherwise, it's not worth the time, effort, and often considerable expense.

Today, many campuses have sophisticated media centers capable of producing top-flight programs. Students in photography, film-making, or television production might also be willing to take on your project under the supervision of a professor. If you do not have such resources, or if you are pressed for time, enlist a professional agency. View samples and check references carefully. Be sure the contract offers you adequate protection. Monitor the progress

at every stage. Buying audio-visuals is far more complex than buying printed material, and there are far more opportunities to go off track.

If you decide to develop an audio-visual production yourself, make sure the medium fits not only the message but the situation in which you plan to use it. Film, video, and slides each have their distinct advantages. And design, images, and footage can be transferred from one medium to another. Coordinate and share the cost of production with other offices, such as alumni, development, admissions, and athletics. Create a show that can be used for several different purposes with only minor changes. Audio-visual presentations should never be longer than 15 minutes.

Don't get so fancy that you become a prisoner of your equipment. One of the chief advantages of developing an audio-visual presentation is that once you've done one, you can take it anywhere.

Sound systems and microphones

Few things are as annoying as a microphone or sound system that fails to function properly. Often, the fault is not with the equipment but with the person trying to run it. For this reason, keep it simple. Use only quality equipment in good repair, even if you must go outside the institution to rent it. Hotels frequently have their own audio-visual technicians or an in-house contractor to handle rental, set-up, and operation.

Check the sound in advance of every event by standing at the podium and speaking into the microphone while another person listens from different areas of the room. The old "testing one, two, three," is not an accurate indicator. Instead, read from the newpaper, raise and lower your voice, laugh, turn your head while talking, step back from the mike, lean down close to it. Have someone who is about the same height as the speaker stand before the mike and adjust it to the proper height.

Remember to turn the mike on before the program begins. Most speakers will assume that the microphone is ready and will be flustered if it is not. But turn it off during the meal to avoid broadcasting the head-table conversation to the audience.

If you are using tape recordings or other pre-recorded messages, be certain the tape is cued properly and practice the cues before guests arrive.

Overhead projectors

Overhead projectors are among the most frequently used instruments of torture inflicted upon conference-goers. Transparencies often are poorly conceived and difficult to read, the image poorly focused and either too small or too large for the screen. Overheads are suitable principally for small meetings. Use well-designed images that complement the presentation. Prepared flip charts can be an effective alternative to overheads.

Slide shows

Use slides for a presentation to a large group. With the graphics capabilities of personal computers, professional-looking images are fairly easy to produce. And a full-scale slide show isn't always necessary—just a few slides to illustrate certain points may be all that's called for.

Audio-visual tips

Here are some tips for preparing and using effective audio-visuals:

- When feasible, purchase your own projectors and keep them just for your use.
- Always have extra bulbs, slide trays, and extension cords on hand.
- Have someone who is thoroughly familiar with the equipment and your show run the program and put it away after each use.
- Do a dry-run of the program any time you're in a new setting. Don't assume it will look and sound the same from room to room.
- Assign one person to operate the lighting and go through the cues and adjustments at least once.
- Remember to deduct the amount of space required for audio-visual equipment from the seating capacity of a room.
- Some hotels require that you rent audio-visual equipment from them or their in-house contractor. Ask for a list of their equipment and services, and the cost.
- When hotel and conference facility contracts say they can provide a "standard audio-visual set-up," it usually means one microphone, one slide projector, and one overhead projector. If you need more than this, you'll have to bring your own.
- Many speakers have developed the habit of relying on slides instead of a written outline for their talks. This can be dangerous if the slide projector malfunctions or the slides are lost in shipping. Although the speaker is responsible for his or her notes, it is good insurance to have an extra set of written notes handy.

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Chapter 7

The Follow-up: It Isn't Over Till the Paperwork's Done

When the event is over and the exhausted planner gazes out over drooping decorations, soiled tablecloths, and chairs in disarray, the work of tying up the special-events package begins.

Before leaving the facility, you should secure or remove all valuables, such as audio-visual equipment, lecterns, microphones, easels, trophies, plaques, and decorations that need to be saved or returned. Check for personal belongings that guests may have left behind. If the event has been held in a large hotel or other rented facility, the contract may stipulate that all decorations and paraphernalia be removed from the property immediately. Anything left behind is likely to be discarded by the housekeeping staff.

On the first working day

On the first working day after an event, give immediate attention to follow-up publicity and write thank-you notes to all the people who helped make the event a success. This includes the speaker and all platform or dais participants, committee members, volunteers, the caterer, and the facility manager. If a student organization provided workers, send one note to the group's president to be shared at its next meeting. Sending thank-yous to behind-the-scenes people, like university security, grounds crews, and the florist, will be much appreciated and will pave the way for good service in the future.

If it is your policy to issue refunds to people who paid but did not attend, do so immediately.

While they are still fresh, send leftover floral arrangements to high-traffic campus offices or to a local hospital or nursing home.

Telephone your committee chairperson and a sampling of other key people to get their reactions to the event and to thank them for participating.

Schedule a final committee meeting within the next two weeks. At the meeting, collect any bills and original office documents.

Be certain that all rental equipment has been returned and that your own equipment has been properly cleaned and stored and that arrangements for any needed repairs have been made or replacements ordered.

While the details are fresh in your memory, write a chronological review of the event with comments about what was good and what was bad.

Within the week

Follow up with your news service or public affairs office to be sure that post-event publicity is being handled according to plan.

Submit all invoices to the financial officer responsible for paying bills. If bills are coming directly to you, verify the charges immediately and pay promptly. Check the arrangements orders from the caterer, florist, and other vendors to be sure they state the final number guaranteed and that any other changes to the original order are noted. Keep copies of all receipts and invoices for your records.

Prepare a final list of who was invited and who attended and keep this list in your permanent file on the event. Share the information with other campus offices. Bill any guests who attended but didn't pay.

Within a month

After the final committee meeting, or as soon as possible if you're not meeting with a committee, prepare a final written report of the event for the permanent file. This should include notes about the theme, the order of activities, the decorations, the facility, the program, the menus, the speakers, the publicity, the number of people who attended each segment, and a complete financial breakdown. Save copies of the invitations, programs, and other printed materials, press releases, and clippings. Include comments about what worked and what didn't from your perspective as well as from that of committee members and guests. This step, tedious though it may be, will prevent you from repeating mistakes from year to year.

When a special event has been many months in the planning process and the committee has invested a great deal of time, it is appropriate (if the budget will allow) to invite members for cocktails or for an informal luncheon or brunch as a final thank-you. If a committee chair has been an especially devoted leader, a small gift that is reminiscent of the university or the event can be presented at this time.

For major events such as an anniversary celebration or a building dedication, prepare a scrapbook and send a copy to the university archives for permanent storage. It is thoughtful to send VIP participants a copy of press clippings and any photographs of them taken during the event.

Determining whether the event accomplished its original goals in the context of the big picture is a very important part of the evaluation process. Did it draw the intended audience? Was the intended message clearly and decisively delivered? Did the event prepare the audience for future events? If it was designed to encourage donations, did it provide enough information and foster enough goodwill so that when a development officer calls, the potential donor will be receptive to the request?

If the event was an open house to increase public awareness of a facility, did the guests receive enough information? Did they find out who can use the building, when, and how much it will cost? Do they know what resources are available?

If an event was poorly attended or didn't generate the funds you had hoped for, call people whom you can trust to give you an honest assessment.

Last, but not least, remember to thank your own staff and coworkers for their hard work.

Chapter 8

Check and Double-check

Many event planners use checklists to make sure everything has been arranged, and nothing has been overlooked. Use the following sample forms as a basis for developing your own checklists. Here's what we've included for your convenience:

- Budget Planning Checklist, page 58
- Planning Timeline, page 60
- Room Set-up Checklist, page 63
- Equipment Checklist, page 64
- Audio-visual Checklist, page 65
- Catering Checklist, page 67
- Bar Checklist, page 68
- Florist/Decorations Checklist, page 69
- Program Checklist, page 70
- Program Participant/VIP Checklist, page 71

Budget Planning Checklist

When planning a special-events budget, take costs for the following items into account:

1. Facilities

- ☐ rental of meeting or reception room(s)
- ☐ overnight accommodations:
  _____number of rooms _____rate
- ☐ rental of:
  - ☐ chairs
  - ☐ tables
  - ☐ props (specify)
  - ☐ lectern
  - ☐ tent
  - ☐ canopy
  - ☐ lighting
  - ☐ extra help
  - ☐ coat checkroom
  - ☐ special electrical or telephone hookups
  - ☐ set-up charges
  - ☐ clean-up charges

2. Food service

- ☐ number of people to be served
- ☐ cost per person for:
  - ☐ coffee hour
  - ☐ luncheon
  - ☐ dinner
  - ☐ afternoon break
  - ☐ cocktail hour
  - ☐ liquor
  - ☐ wine
  - ☐ other beverages
  - ☐ table linen
  - ☐ rented table service
  - ☐ gratuities
  - ☐ test meal

3. Equipment rental

- ☐ tables
- ☐ canopy or tent
- ☐ chairs
- ☐ flooring or carpeting
- ☐ risers
- ☐ ropes or stanchions
- ☐ props
- ☐ registration desks and stools
- ☐ outdoor toilets
- ☐ booths
- ☐ lighting
- ☐ backdrop
- ☐ trash containers
- ☐ fencing

4. Decorations

- ☐ flowers
- ☐ table decorations
- ☐ extra plants
- ☐ props
- ☐ corsages, boutonnieres
- ☐ candles
- ☐ direction signs
- ☐ other decorations (such as ribbon, balloons)

5. Design and printing

- ☐ fee for design concept and package
- ☐ advance announcements
- ☐ invitations
- ☐ programs
- ☐ promotional flyers
- ☐ posters
- ☐ tickets
- ☐ maps
- ☐ placecards
- ☐ signs
- ☐ registration packets
- ☐ name tags and holders
- ☐ any other printed materials

(continued)

6. Postage and shipping
- ☐ postage for invitations and reply cards
- ☐ bulk mailing of promotional materials
- ☐ mailing house charges
- ☐ shipping

7. Recognition items
- ☐ awards, plaques, trophies
- ☐ engraving
- ☐ calligraphy
- ☐ framing
- ☐ shipping and handling

8. Miscellaneous
- ☐ VIP travel and expenses
- ☐ honoraria
- ☐ gifts
- ☐ mementos
- ☐ extra help
- ☐ security
- ☐ insurance
- ☐ first-aid station
- ☐ taping and transcribing proceedings
- ☐ visitors' center materials and staff
- ☐ electrical connections
- ☐ water hookups

9. Transportation
- ☐ buses
- ☐ vans
- ☐ parking
- ☐ valets

10. Entertainment
- ☐ fees
- ☐ additional equipment
- ☐ promoter fees

11. Publicity
- ☐ advertising
- ☐ photographer
- ☐ printed photos
- ☐ slides
- ☐ duplicating
- ☐ mailing
- ☐ entertaining/hospitality for the press
- ☐ press room equipment
- ☐ banners

12. Audio-visual equipment
- ☐ slide and film projectors
- ☐ screens
- ☐ extension cords
- ☐ projector carts
- ☐ microphones
- ☐ mixers
- ☐ speaker system
- ☐ tape recorders
- ☐ television monitors
- ☐ VCRs
- ☐ overhead projectors
- ☐ pointers
- ☐ flip charts
- ☐ blackboards
- ☐ technician and operator services

13. Office expenses
- ☐ staff time
- ☐ overtime and compensatory time
- ☐ additional staff (temporaries, students)
- ☐ data processing
- ☐ phones
- ☐ duplicating
- ☐ postage for general correspondence
- ☐ supplies (pens, pads, decals, folders)
- ☐ committee materials
- ☐ hospitality for committee members
- ☐ complimentary tickets
- ☐ staff accommodations
- ☐ staff travel and expenses

☐ ☐ ☐ ☐ ☐

Planning Timeline

Six months to a year ahead:

- ☐ Select a theme.
- ☐ Select the date, but before confirming it:
  - ☐ clear the date with important participants;
  - ☐ double-check for conflicts with major institution or city functions;
  - ☐ consider whether weather conditions or other demands on people's time (holidays, summer vacations, the start of school) might make that date inconvenient.
- ☐ Plan and get approval of a budget.
- ☐ Draw up a preliminary guest list.
- ☐ Select and reserve a facility.
- ☐ Develop a rain plan if the event is to be held outdoors.
- ☐ Reserve a block of hotel rooms, if necessary.
- ☐ Select and order recognition items and get them engraved immediately.
- ☐ Order favors, souvenirs, printed folders, and other give-away items.
- ☐ Reserve special equipment such as vans, buses, tables, chairs, tents, podiums.
- ☐ Confirm a master of ceremonies and the program speakers.
- ☐ Audition entertainers.
- ☐ Plan audio-visual presentations and begin taking pictures to build a photo file for use in publications.
- ☐ Make preliminary security arrangements.
- ☐ Contact your risk manager to discuss insurance coverage.
- ☐ Get all necessary administrative approvals.
- ☐ Plan promotion and publicity.

Three to six months ahead:

- ☐ Plan and get approval of printed invitations and all other printed materials.
- ☐ Finalize and get approval of the guest list.
- ☐ Select menus and submit them for approval.
- ☐ Print tickets and parking permits.
- ☐ Make contact with dais participants and:
  - ☐ supply suggestions for their remarks;
  - ☐ gather their biographical information;
  - ☐ request a black-and-white glossy photo of each participant for publicity and programs;
  - ☐ inform participants if academic regalia will be needed; get their sizes and order for them if they do not have their own.
- ☐ Keep campus officials, deans, administrative officers, and local trustees (if appropriate) informed of your plans and ask for their support.
- ☐ Confirm entertainment bookings.
- ☐ Plan the decorations and color scheme. Order props, special napkins, foods, or other unusual needs.
- ☐ Finalize the audio-visual presentations.
- ☐ Meet with the florist.
- ☐ Update security on your plans.
- ☐ Begin publicity, if appropriate.
- ☐ Send advance announcements to guest list, if appropriate.

Two months ahead:

- ☐ Address invitations and set a mailing date.
- ☐ Finalize decorations and facility arrangements.
- ☐ Make hotel and transportation arrangements for out-of-town dignitaries.
- ☐ Mail an itinerary to dignitaries; include a reminder about bringing academic regalia (if needed).
- ☐ Double-check your academic regalia order.
- ☐ Secure hosts and hostesses and other university representatives to assist.
- ☐ Double-check the extra help that will be needed including valets, checkroom attendants, and greeters.
- ☐ Make direction and welcome signs.
- ☐ Write and print the program and menu cards (if needed).
- ☐ Get placecards lettered for everyone on the guest list.
- ☐ Check that any ceremonial items needed such as flags, the university mace, medals, toasting goblets, and the like can be located and that all are clean and in good repair.
- ☐ Check that flagpoles and stands are in working condition, and easels for displaying awards and seating charts are available and work properly.
- ☐ Inspect the facility and request repairs to hazards that could cause an accident such as loose edges on stairs and upturned edges on carpeting.
- ☐ Continue publicity on schedule.

Two to four weeks ahead:

- ☐ Record and acknowledge RSVPs as they are received; send tickets, parking permits, and maps by return mail.
- ☐ Ask the grounds department to schedule a crew to mow and trim the grounds of the facility the day before your event. If your event will be held outdoors, request that the area be sprayed with insect killer.
- ☐ Take delivery on all printed materials.
- ☐ Stuff registration packets (if needed).
- ☐ If your event is taking place in another city, ship printed materials and other items to the meeting site. Call your contact person and ask how to label the shipment so that it will be accepted.
- ☐ Double-check publicity progress with the public relations staff. Revise and update plans if necessary.
- ☐ Send detailed final instructions to all dignitaries with all tickets, parking permits, and maps. Supply them with the names and phone numbers of university officials and other VIPs who will be attending. Remember to include the first name of each VIP's spouse.
- ☐ Notify the caterer if the count seems to be significantly higher or lower than previously discussed.
- ☐ Write speeches and introductions and get them approved.
- ☐ Take delivery on favors or mementos. Double-check for correct amount.
- ☐ Get table numbers made.
- ☐ Enlarge a diagram of the room to be used as a seating chart.

(continued)

Planning Timeline continued

Two weeks ahead:

- ☐ Have a final meeting with security.
- ☐ Check-in with the florist and caterer; send reminder cards to entertainers, student workers, and volunteers.
- ☐ Schedule delivery times for special equipment such as tables, audio-visual equipment, and props.
- ☐ Work with the public relations staff on final publicity arrangements.
- ☐ Have all speeches duplicated and photos reproduced.

One week ahead:

- ☐ Ascertain the intentions of anyone who has not sent an RSVP.
- ☐ Print out the guest list in alphabetical order.
- ☐ Finish placecards.
- ☐ Make the seating chart.
- ☐ Brief the hosts and hostesses, greeters, and VIP escorts.
- ☐ Gather all presentation items such as gifts, plaques, trophies. Collect all ceremonial items. Put everything in a convenient, secure place and place one person in charge of transporting them to the event site.
- ☐ Plan an arrival briefing for VIPs if necessary.
- ☐ Call the university president's office and double-check for last-minute snags.
- ☐ Call security and double-check all arrangements. Provide them with final itineraries and VIP information.
- ☐ Send the guest list (with full names, titles, business and professional affiliations, and specific institutional interests), along with a final schedule of events, to the president, other academic officers, and official hosts.
- ☐ Deliver prepared introductions, citations, and speeches to those who will read them. Make extra copies for each person's secretary.
- ☐ Make catering guarantees.
- ☐ Have a university car filled with gas, cleaned, and placed on standby in case an emergency trip must be made to pick up a VIP or a forgotten item. Be certain the car has the appropriate parking permits for admission to all university lots.

The big day:

- ☐ Arrive early.
- ☐ Have all the clothing and accessories with you that you will need for the entire day in case there is no time to go home to change.
- ☐ Have all instructions, directions, phone numbers, keys, extra parking permits, seating charts, and guest lists with you.
- ☐ Check all facilities and grounds. Pick up litter and spray for bugs if necessary.
- ☐ Assign one worker to be your assistant, to stick close to you to run errands, send messages, and be on call for whatever need may arise.
- ☐ Relax and smile. Never tell "war stories" to your guests or intimate that things might be less than perfect. Chances are, no one but you will notice minor mistakes.

☐☐☐☐☐

Room Set-up Checklist

Date: _____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Caterer: _____

Contact person: _____ Phone: _____

Florist: _____

Contact person: _____ Phone: _____

Specifications

Set-ups: _____

Stage: _____ Lights: _____ Sound: _____

Bandstand: _____

Lectern: _____

Microphones: _____ Type needed: _____

Location of mikes: _____

Bars and serving areas

Bar needed: _____ Location(s): _____

Checkroom needed: _____ Location: _____

Registration area needed: _____ Location: _____

Floor plans

On a separate sheet, diagram the floor plan for each area to be used. Show set-ups for all areas; note traffic patterns and all entrances and exits.

□ □ □ □ □

Equipment Checklist

Date: _____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Rental company/On-campus source: _____

Address: _____

Contact person: _____ Phone: _____

Equipment needed and quantity: _____

_____

_____

_____

Colors: _____

Cost: _____

Deposit required: _____ Balance due: _____

Delivery and set-up instructions: _____

_____

_____

_____

Pickup instructions: _____

_____

_____

Audio-visual Checklist

Date:_____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Equipment supplier: _____

Address: _____

Contact person: _____ Phone: _____

Check equipment needed:

☐ **Slide projectors:** No. needed: _____ For room: _____ Time: _____

☐ **Slide trays:** No. needed: _____ For room: _____ Time: _____

☐ **Projector stands:** No. needed: _____ For room: _____ Time: _____

☐ **Extension cords:** Length: _____

No. needed: _____ For room: _____ Time: _____

☐ **Spare bulbs:** Size: _____

☐ **Screens:** No. needed: _____ For room: _____ Time: _____

☐ **Microphones:** Type: _____

No. needed: _____ For room: _____ Time: _____

☐ **Overhead projectors:**

No. needed: _____ For room: _____ Time: _____

☐ **Tables:** Size: _____

No. needed: _____ For room: _____ Time: _____

☐ **Chairs:** Size: _____

No. needed: _____ For room: _____ Time: _____

☐ **Podiums:** No. needed: _____ For room: _____ Time: _____

☐ **Podium lights:** No. needed: _____ For room: _____ Time: _____

(continued)

Audio-visual Checklist continued

☐ **Televisions:** No. needed: _____ For room: _____ Time: _____

☐ **VCRs:** No. needed: _____ For room: _____ Time: _____

☐ **Tape recorders:** Cassette: _____ Reel-to-reel: _____ Type: _____

No. needed: _____ For room: _____ Time: _____

☐ **Cart:** No. needed: _____ For room: _____ Time: _____

☐ **Blackboards:** No. needed: _____ For room: _____ Time: _____

☐ **Flip charts:** No. needed: _____ For room: _____ Time: _____

Miscellaneous (check all that apply and note special instructions below):

☐ **16mm projector** ☐ **Telephone**

☐ **Pointer** ☐ **Hand truck**

☐ **Extra extension cords/length:** _____

☐ **Other:** _____

Estimated cost: _____ Amount of deposit: _____ Balance due: _____

Operator instructions: _____

_____

_____

_____

Special instructions: _____

_____

_____

_____

Equipment to be delivered on: Date: _____

Time: _____

Deliver to: _____

_____

_____

Equipment to be picked up: Date: _____

Time: _____

Pickup instructions: _____

_____

_____

☐ ☐ ☐ ☐ ☐

Catering Checklist

Date: _____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Caterer: _____

Address: _____

Contact person: _____ Phone: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Time to serve: _____ Projected no. of guests: _____

Date, time for final guarantee: _____

Cost per person: _____ Total projected cost: _____

Deposit required: _____ Paid on date: _____

Balance due: _____

Menu: _____

_____

_____

_____

Wines: _____ Toasting: _____

Linen colors: Napkins _____ Tablecloths: _____

Uniform for service personnel: _____

Placecards: _____ Menu cards: _____ Programs: _____

Favors: _____

Cocktails: Time to serve: _____ Time to close: _____

Location(s) of bar(s): _____

Service specifications: _____

Equipment to be supplied: _____

□ □ □ □ □

Bar Checklist

A well-stocked bar should have these supplies:

Alcoholic beverages

- ☐ vodka
- ☐ gin
- ☐ whiskey
- ☐ scotch
- ☐ bourbon
- ☐ rum
- ☐ beer, regular and light
- ☐ white wine
- ☐ dry vermouth

Non-alcoholic beverages and mixes

- ☐ water
- ☐ soda water
- ☐ tonic water
- ☐ selection of soft drinks (including diet drinks)
- ☐ tomato juice
- ☐ orange juice
- ☐ sparkling mineral water

Garnishes

- ☐ lemon and lime wedges
- ☐ cherries
- ☐ olives
- ☐ cocktail onions
- ☐ Angostura bitters
- ☐ sugar

Tools

- ☐ paring knife
- ☐ pitchers
- ☐ measuring spoons
- ☐ jigger
- ☐ strainer
- ☐ shaker
- ☐ towels
- ☐ corkscrew
- ☐ can opener
- ☐ bartender's guide of drink recipes
- ☐ cocktail napkins
- ☐ toothpicks
- ☐ ice
- ☐ ice tongs

Florist/Decorations Checklist

Date:_____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Florist: _____

Address: _____

Contact person: _____ Phone: _____

Color scheme: _____

Type of flowers ordered for:

Tables: _____

Dais: _____

Reception area: _____

Foyer: _____

Corsages: _____ Boutonnieres: _____

Ushers/hosts/hostesses: _____

Other: _____

Time for delivery: _____ Containers to be returned: _____

Rented equipment: _____

Return by: _____ Florist to pick up by: _____

Other decorations: _____

_____

Supplier: _____

Address: _____

Contact person: _____ Phone: _____

Special instructions: _____

□ □ □ □ □

Program Checklist

Date: _____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Program content: _____

_____

Honored guests/VIPs: _____

_____

Musicians/Band: _____

Contact person: _____

Address: _____

Time to begin: _____ Time to end: _____

Time to set up: _____ Fee: _____

Master of ceremonies: _____

Address: _____

Phone: _____

Speakers:

Name: _____ Name: _____

Address: _____ Address: _____

Phone: _____ Phone: _____

Audio-visuals to be used: _____

Equipment supplied by: _____

Address: _____

Contact person: _____ Phone: _____

□ □ □ □ □

Program Participant/VIP Checklist

Date: _____

Event title: _____

Date/Time: _____

Institution sponsor: _____

Event planner: _____ Phone: _____

Address: _____

Facility name: _____

Address: _____

Facility manager: _____ Phone: _____

Rooms being used: _____

Participant's name: _____

Title/Affiliation: _____

Office address: _____

Home address: _____

Office phone: _____ Home phone: _____

Contact person: _____

Office (name, area code/phone): _____

Home (name, area code/phone): _____

Audio-visual requirements:

(List equipment needed. If none will be needed, state "none.")

_____

_____

_____

Academic regalia:

☐ Will furnish own ☐ Need to order: Gown size _____ Cap size _____

To receive: ☐ Award ☐ Medal ☐ Plaque ☐ Citation ☐ Honorary degree

☐ Other _____

Presentation item ordered: _____ From: _____

(continued)

Program Participant/VIP Checklist continued

Arrival: Date: _____ Time: _____

Driving: _____ Arriving by plane: _____

Flight (airport/airline/number/time): _____

To be met by: _____ Phone: _____

Meeting Place: _____

Accommodations:

Hotel name: _____

Address: _____

Phone: _____ Dates of reservations: _____

Departure: Date: _____ Time: _____

Driving: _____ Arriving by plane: _____

Flight (airport/airline/number/time): _____

To be escorted by: _____ Phone: _____

Will meet for departure at: _____

Expenses: ☐ To be paid by participant ☐ To be reimbursed, receipts required

☐ To be paid by: _____

Address: _____

Account number or other billing information: _____

Honorarium to be paid: $ _____ Budget: _____

Other needs: Special diet: _____

Handicapped parking/seating: _____

Is spouse accompanying? _____ If so, name: _____

Notes: _____

_____

_____

_____

_____

☐☐☐☐☐

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About the Author

April L. Harris

April Harris has worked in public relations and university advancement throughout her career. A 1975 journalism public relations graduate of Bowling Green State University (Ohio), her first professional position was as a member of the communications staff of the State of Ohio Department of Economic and Community Development, Columbus.

In 1977, she joined the alumni and development staff at Bowling Green State University where she developed and promoted a series of alumni programs, including an alumni college and alumni travel program; planned special events; served as the alumni editor of the university publication, *At Bowling Green*; and managed the university's Mileti Alumni Center.

With the approach of Bowling Green's 75th anniversary in 1985 and the announcement of a capital campaign, Harris became associate director of development for public relations. She served as a key member of the planning committee for the university's year-long 75th anniversary celebration and was responsible for capital campaign public relations and special events planning.

In 1986, Harris accepted a position with the public affairs staff of Baylor College of Medicine in Houston, Texas. Currently, she is the editor of the college's alumni publication, *Baylor Connections*, and works with the development staff in fund raising. As a writer for Baylor's National Research and Demonstration Center in Arteriosclerosis and the DeBakey Heart Center, she is a member of the staff that disseminates information to the public about heart disease prevention and how to have a healthy lifestyle.